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ABSTRACT

This guide provides teachers with a business exploration curriculum for grade 9. The course is designed to introduce beginning students to the language of business, to careers, to consumerism, to economics, and to technology. An "Overview" section presents the rationale, describes the program structure, and lists program goals and objectives. The "Implementation" section covers program design, scope and sequence, time allotment, integration, selection of materials, evaluation, and students with special needs. The curriculum is divided into six modules: career exploration, consumerism, accounting and data processing, office procedure, marketing, and keyboarding (typewriting). Each module includes notes and suggested time, major objectives, and student objectives (and topics) with suggested activities and note and resources. Appendixes include overhead transparency masters for module VI; keyboarding (typewriting); and testing, grading, and evaluation for module VI. A bibliography is also provided. (YLB)

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exploration of business (9)

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This guide replaces the curriculum guide for Exploration of Business issued in 1973. It has been developed as part of the overall revision of the Business Education program for the secondary and junior high schools of Manitoba. It is based on recommendations included in the Vocational Area Task Force Report of 1978, and in Education for the Middle Years, a 1977 position paper of the Middle Years Program Review Committee, as well as on suggestions from junior high and secondary school teachers.

Exploration of Business 9 (1984) becomes the approved provincial guide for Exploration of Business, Grade 9, effective the fall of 1984.

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overview

OVERVIEW

INTRODUCTION

The Exploration of Business curriculum, grade 9, has been revised to reflect the recommendations of the Vocational Area Task Force and the philosophy of the Middle Years Program Review Committee. It reflects awareness of the many forms of business and business activities, and the social and technological changes which influence life styles and businesses in our rapidly changing society. It provides objectives and learning experiences which enable students to maximize their effectiveness as individuals within the family, business world, and community.

This guide, emphasizing the continuing responsibilities of individuals and groups and the process by which decisions are made and actions taken, should help teachers to meet students' physical, social, emotional, and intellectual needs. It provides student objectives, suggested activities, notes, and resources to assist teachers in planning the course in relation to their students as well as to local needs, resources, and personal preferences.

RATIONALE

Exploration of Business, grade 9, is designed to contribute to the growth and development of students in the middle years. It is designed to help them clarify values, set personal goals, and explore future careers and studies in the field of business.

Emerging adolescents engaged in this program of study can find that it helps them to seek and develop identity and self-concept, to appreciate basic skills such as learning how to learn and make decisions, to explore skills relevant to personal, family, and business life, and to recognize the need for the effective use and control of resources and technologies. A practical program, Exploration of Business encourages students to develop new interests and capacities and to explore educational and career choices actively in business-related areas.

THE DEVELOPMENTAL STAGES OF ADOLESCENTS

The content of the exploration of business program is related to adolescent developmental stages. Adolescent needs can be described under these headings: cognitive, physical, emotional, social, and moral. The outline, on the following pages, of typical needs and characteristics of junior high school students has served as a useful reference in compiling learning experiences for this guide.

STRUCTURE OF THE PROGRAM

The curriculum is divided into six modules: Career Exploration, Consumerism, Accounting and Data Processing, Office Procedures, Marketing, and Keyboarding (Typewriting).

IT IS RECOMMENDED that:

- students study five of the six modules as a minimum program;
- keyboarding (typewriting) be an optional module;

ADOLESCENT NEEDS	ADOLESCENT CHARACTERISTICS
Cognitive: Develop intellectual activity which is logical and abstract, with thinking becoming more mobile, flexible and less egocentric.	Interested primarily in self, but gradually developing greater interest in the outside world and in family problems.
Physical: Develop the physique and use the body effectively.	A physical age with tremendous variations. Growth makes demands on energy. Growth affects self-concept. Concern with awkwardness and physical appearance. Experience difficulty in carrying out long-range projects. May be restless, with short attention span.
Emotional: Emotional needs are closely linked to physical needs. Achieve emotional independence from parents and other adults.	Variable and intense. Great stresses and contrasts. Need to come to terms with emotions. Inclined to be enchusiastic and often impulsive. Seeking identity.

ADOLESCENT NEEDS	ADOLESCENT CHARACTERISTICS
Social: Desire and achieve socially responsible behavior.	Relationship with peers important. Group oriented, but conflict between group and individual. Increasing maturity. Rise of sexuality and relationships with opposite sex.
Moral: Acquire a set of values and an ethical system as a guide to behavior.	Live primarily in the present, now rather than tomorrow, but gradually growing more concerned with immediate and distant future. Social and intellectual development have important consequences for moral growth. Make personal evaluations. Begin to formulate personal moral code. Less inclined to accept parental values. Begin to put self in another's place.

- objectives in the module "Career Exploration" be integrated with the other modules, and/or taught as a separate module;
- the sequencing of modules be based upon local circumstances (such as access to a facility, or teacher/student preference);
- the extent of coverage in each module be based upon local circumstances (such as access to a facility, or teacher/student preference);
- "Enrichment Activities" be used when assessment of student needs/teacher preferences indicates that indepth studies are desirable;
- the theme of "Exploration" be maintained, without allowing skill development to substitute.

Each of the six modules includes the following:

- Major objectives accompany each module and provide an overview of what students should achieve through study of the module.

- Student objectives are related to topics and are sequenced to lead to an understanding of the major objective. The objectives are based on students' needs and average abilities. Learning one objective leads to insight into how to proceed to the next, and eventually to an understanding of the major objective and the topics. If students are aware of the objectives, they may identify with them more closely and aim to achieve them.

- Suggested activities and notes are designed to help students achieve objectives. These experiences help students to acquire knowledge, learn skills, evaluate attitudes and values, and develop understanding and appreciation of topics and objectives. The learning experiences and activities should be added to and updated continually by the teacher and the students.

- Resources are suggested to assist the teacher and students in developing and understanding the topics, objectives, and learning experiences. The resources should be added to and updated continually by the teacher and students.

PROGRAM GOALS

The study of Exploration of Business, grade 9, will enable students to:

- Appreciate the interdependence of the individual and groups in business, and understand the factors affecting this relationship.
- Understand the influences affecting decision-making and realize that natural and business resources can be used effectively in making appropriate choices.
- Identify values and priorities in life, and consider the quality of life as much as the quantity of production and consumption.
- Understand the ways in which an individual, alone or as part of a group, can increase opportunities to achieve satisfaction in life.
- Understand the necessity of adapting to a world of change.
- Develop knowledge and skills to meet the present and future needs of society.
- Appreciate the interdependence of practicing the management skills of planning, organizing, and controlling work, and the importance of practicing these.
- Develop critical thinking related to the materials, equipment, and processes of business.
- Recognize the importance of safety in the use and maintenance of business equipment.
- Recognize consumer rights and responsibilities in relation to the individual and to various types of businesses.
- Recognize and understand the vocations and general

occupational characteristics of various types of businesses.
- Recognize the relationship of personal interests, abilities, preferences, and values to various career areas.

PROGRAM OBJECTIVES

Educational objectives--classified as psychomotor, affective, and cognitive--can be interrelated. The teacher may choose to concentrate on one objective at a time or to correlate two or three together. Frequently, at least two, if not all three, types of learning occur simultaneously. While developing a skill, the student can at the same time acquire attitudes and values as well as knowledge of principles related to that skill.

MAJOR OBJECTIVES: EXPLORATION OF BUSINESS

Exploration of Business is designed to introduce beginning students to the language of business, to careers, to consumerism, to economics, and to technology. This program of study should help students to understand not only the selection and use of business forms, supplies, and equipment, but also the abilities, techniques, and attitudes needed by individuals working in business. Study of these concepts can involve students in practical, creative, and satisfying learning experiences, leading them both to appreciate high standards and to consider future educational, vocational, and life skills.

The student should be able to:

- Explore the significance of Exploration of Business, gain general information about career fields, and match interests, abilities, preferences, and values to characteristics of various careers.
- Explore the principles of consumer law, credit, savings and investments, banking, taxation, and money management and apply these principles to develop consumer awareness.
- Explore career opportunities in accounting and data processing, recognize their significance to individuals and businesses, and develop an understanding of their introductory principles and applications.
- Explore clerical and secretarial career opportunities and gain an understanding of office tasks and functions.
- Recognize the importance of marketing and marketing careers by gaining knowledge of introductory marketing principles in retailing, promotions, and human relations.
- Acquire knowledge of the basic theory and principles of keyboarding and explore introductory applications.

OBJECTIVES: EXPLORATION OF BUSINESS, GRADE 9

Module I: Career Exploration

The student should be able to:

- define Exploration of Business;
- develop an understanding of the purpose of Exploration of Business;
- recognize the relationship between Exploration of Business and senior high school business education;
- develop an awareness of the business education programs in the local school division/schools;
- review the modules for Exploration of Business;
- develop an awareness of the major groups of occupations;
- identify career groups or families;
- collect information about careers related to the

major groups of occupations;
- identify careers related to business, office, and sales groups;
- recognize the importance of business, office, and sales careers;
- recognize the significance of making career decisions and of planning for the future;
- identify skills and aptitudes required for specific occupations;
- identify personal interests, abilities, needs, and goals;
- match personal interests and abilities to occupational requirements;
- explain the relationship of work to society, economics, and the individual;
- recognize the significance of changing and evolving technologies on careers;
- assess individual aptitudes and interests pertinent to career clusters;
- develop a tentative career plan;
- identify a realistic educational program to fulfill career goals;
- identify sources of information about jobs;
- develop an understanding of the purposes of job descriptions;
- recognize the skills necessary for successful job seeking;
- prepare personal resumés and job applications;
- explain the relationship of interviews to resumés, letters of application, and application forms.

Module II: Consumerism

The student should be able to:

- define consumerism;
- develop an awareness of the relationship between consumerism and consumers;
- develop an understanding of the need for consumer protection;
- list various government departments and other agencies that inform and protect consumers;
- describe the consumer protection functions of various government departments and other agencies;
- develop an awareness of consumer rights and responsibilities;
- define credit;
- describe how credit benefits the economy and the consumer;
- recognize the advantages and disadvantages of credit;
- identify sources of short-term and long-term credit;
- develop an understanding of the cost of credit;
- recognize the significance of choosing and using credit wisely;
- define savings and investments;
- recognize the importance of savings and investments;
- identify the common types of savings and investment opportunities;
- explain the branch banking system;
- identify types of financial institutions other than branch banks;
- identify common services offered by banks and other financial institutions;
- identify services provided by various levels of government;
- explain how governments pay for the services provided;
- identify the common types of taxation;
- explain the purposes of provincial retail sales tax, income tax, and property tax;
- develop an understanding of the need for money management;
- discuss the components of a pay cheque;
- develop an understanding of the budgeting process;
- prepare a personal budget;
- develop an approach to purchasing.

Module III: Accounting and Data Processing

The student should be able to:

- recognize the importance of accounting;
- discuss and define accounting;
- develop an awareness of common job titles in the accounting and data processing families of occupations;
- identify accounting and data processing jobs in the local community;
- develop an understanding of the work environment for accounting and data processing jobs;
- list skills, abilities, and personal traits generally useful in various accounting and data processing jobs;
- develop an awareness of the secondary and post-secondary education related to accounting and data processing careers;
- explain the need for financial records and accounting systems;
- describe and use the basic accounting principles for starting an accounting system;
- classify assets, liabilities, and owner's equity;
- classify as an asset or a liability each item from a random list of assets and liabilities;
- calculate total assets and total liabilities;
- determine owner's equity;
- determine, when given two elements, the missing element in the fundamental accounting equation;
- develop an understanding of the purpose of income statements;
- identify, analyze, and record increases and decreases in the fundamental elements (assets, liabilities, owner's equity, revenue and expenses) resulting from business transactions;
- interpret and analyze financial statements;
- explain the purpose of ledger accounts;
- explain the relationship of each ledger account to the accounting equation;
- apply the principles of debit and credit to accounts (assets, liabilities, and owner's equity);
- show increases and decreases in asset, liability, and owner's equity accounts;
- show increases and decreases in revenue and expense accounts;
- understand the importance of a journal;
- understand the purposes of the ledger;
- understand the purpose of a trial balance;
- define accounts receivable;
- explain, prepare, and verify source documents;
- define accounts payable;
- define data processing;
- recognize the importance of data processing;
- identify the two main methods of data processing;
- develop an understanding of the data processing cycle;
- recognize the significance of computer applications to business accounting;
- define flowcharting;
- explain the purpose of flowcharting;
- identify and use flowcharting symbols;
- use flowcharting to solve problems.

Module IV: Office Procedures

The student should be able to:

- recognize the importance of clerical and secretarial skills and knowledge;
- develop an awareness of common job titles in the clerical and secretarial families of occupations;
- identify clerical and secretarial jobs in the local community;
- develop an understanding of the work environment for clerical and secretarial jobs;
- list skills, abilities, and personal traits useful in various clerical and secretarial jobs;

- develop an awareness of secondary and post-secondary education related to clerical and secretarial careers;
- define the term office;
- develop an understanding of the components of an office;
- identify and describe the different types of business offices;
- list various tasks in different types of offices;
- define communication;
- understand the need for communication in an office and for office tasks;
- explain the relationship between communication and the telephone;
- recognize the importance of using good telephone techniques;
- describe methods of handling mail;
- explain the basic duties assigned to a receptionist;
- recognize the need for managing and filing papers and documents;
- identify various filing systems;
- file papers alphabetically;
- identify business correspondence and forms prepared in and office;
- develop an understanding of the benefits of notemaking and/or shorthand skills;
- identify learning skills improved by notemaking;
- list uses made of notemaking in the classroom, in personal life, and in business;
- identify various shorthand systems used in Manitoba secondary schools.

Module V: Marketing

The student should be able to:

- recognize the importance of marketing;
- develop an awareness of common job titles in the wholesaling and retailing family of occupations;
- identify wholesaling and retailing jobs in the local community;

- develop an understanding of the work environment for wholesaling and retailing jobs;
- list skills, abilities, and personal traits related to wholesaling and retailing jobs;
- develop an awareness of secondary and post-secondary studies related to wholesaling and retailing careers;
- define retailing;
- explain procedures for ordering goods for a merchandising business;
- recognize the importance of transporting goods to and storing goods for a merchandising business;
- recognize the importance of systematic receiving procedures;
- identify the steps in preparing goods for sale;
- develop an awareness of the relationship of product knowledge to selling products;
- list customers' buying motives;
- identify and explain buying decisions;
- develop an understanding of the selling process;
- define and understand the purpose of promotions;
- explain how displays influence customers;
- describe the use of advertising and public relations to influence customers;
- define human relations;
- identify ways to improve the development of human relations;
- describe the expectation in business that employees get along with others;
- recognize the influence of change on an individual's personality and on job satisfaction.

Module VI (Option): Keyboarding (Typewriting)

The student should be able to:

- understand the need for an efficiently organized keyboarding station;
- understand the need for correct posture at the typewriter and demonstrate correct posture;

. explore the need for the proper operation, care, and maintenance of the typewriter;
. understand and explain the purposes of the most common typewriter parts;
. demonstrate the correct use of the following manipulable parts of the typewriter:
  - backspace key,
  - carriage return lever or carriage return key (line spacer),
  - carriage release,
  - carriage scale, alignment scale, printing-point indicator,
  - card holders,
  - cylinder or platen, and knobs,
  - margin stops,
  - margin release key,
  - paper bail, bail scale, bail rolls,
  - paper guide, paper rest/table,
  - paper pressure release,
  - shift key mechanism,
  - space bar,
  - tabular, tab clear, tab set;
. demonstrate the correct method of performing basic typewriting procedures:
  - insertion and removal of paper from typewriter,
  - planning and setting of margins,
  - listening for the bell,
  - making end-of-line decisions,
  - re-inserting paper and aligning typescript;
. identify the alphabetic keyboard;
. demonstrate the ability to use ballistic stroking of the alphabetic keys;
. keyboard copy to learn the operation of the alphabetic keyboard;
. identify the non-alphabetic keyboard;
. keyboard copy to learn the operation of the non-alphabetic keyboard;
. keyboard copy to develop continuity in the operation of the non-alphabetic keyboard;
. demonstrate appropriate techniques for the correction of errors;
. compose while typewriting:
  - one-word responses,
  - phrase responses,
  - sentence responses;
. demonstrate the ability to use display or art typewriting.

implementation

IMPLEMENTATION

PROGRAM DESIGN

This curriculum guide is designed to help teachers meet the needs of adolescents in a rapidly changing society. Its flexibility is meant to encourage teachers to plan and implement the program using personal knowledge and creativity. The program contains the following features:

1. The format of the previous Exploration of Business curriculum has been changed and the content made more comprehensive.

2. Exploratory and theoretical knowledge are interrelated. The content is exploratory in its purpose, organization, and use, and theoretical in its recognition of the concepts of individualism and interpersonal relationships and the processes of decision-making and problem-solving.

3. Ideally, the curriculum is student-oriented both in content and instructional approach. Emphasis is placed on creative exploration, self-direction, and independence. Because peer relationships are so important, some group work is emphasized. Instruction should be flexible to accommodate the wide variation in individual growth rates and stages of development.

4. The Exploration of Business curriculum has clearly defined objectives and program goals which become the criteria by which content is specified, procedures are developed, materials and resources are selected, and evaluative techniques are prepared.

5. Modules with accompanying objectives have been identified. For an extended program and maximum time allotment, teachers are encouraged to pursue topics identified in "Enrichment Activities."

6. The sequential order within the modules provides a systematic approach to the development of the program. To help students develop skills, attitudes, and understanding basic to making and implementing responsible decisions, teachers are encouraged to consider the following alternative approaches:

   - The Process Approach involves the mastery of essential processes, such as searching, classifying, categorizing, hypothesizing, testing, valuing, criticizing, planning, problem-solving, decision-making, and reporting.

   - The Project Approach incorporates a number of different educational activities, such as investigating, analyzing, planning, synthesizing, evaluating, purposing, defining, and relating. The project should be a means to a goal and not the goal itself. The purposes of the project approach are to implement and develop the content and processes related to the modules as well as to contribute to the development of individuals.

   - The Decision-Making Approach is basic to all areas of the program and includes the processes of inquiry, valuing, decision-making, and action.

   - The Needs Approach assumes that individuals and groups have certain physical, aesthetic, social,

and psychological needs, and is based on meeting those needs.

- The Problem Approach, the case study, is based on the observation that individuals, groups, communities, and businesses encounter problems which relate to survival in society. In the classroom, a variety of problem situations related to everyday living should be introduced.

7. Because learning is unique for each student, a rich environment for every aspect of the Exploration of Business program must be provided. The environment should include attractive, well-organized and safe surroundings, suitable and sufficient materials, and good working equipment.

   Learning is facilitated if student purposes are achieved and if students participate in selecting and planning classroom projects. Classroom experiences should progress from one successful accomplishment to another.

8. The suggested activities are designed to help students achieve objectives. These experiences help students acquire knowledge, evaluate attitudes and values, and develop understanding, appreciation, and perception. The most relevant activities lend support and credibility to a topic and lead to the achievement of an objective.

   The activities, only "suggested," provide teachers with initial assistance in developing a wide range of activities to meet student needs. Students should be involved in the selection of learning experiences. Teachers should consider the cultural background, previous experience and special needs of

students in order to provide maximum learning opportunities.

The structure of the content is the key to encouraging further learning.

SCOPE AND SEQUENCE

The six modules of the Exploration of Business program may be taught separately as outlined, or combined.

Teachers should emphasize and integrate the following study areas throughout the program: vocabulary, safety, consumerism, career information, decision-making, interpersonal relationships, positive attitudes and work habits, communication skills, resource management, needs, values, goals, and classroom organization. To this end, these topics are woven into each module.

The scope and sequence should allow for a developmental progression of tasks and learning related to the modules. The following are criteria to consider when organizing the modules and the related objectives, learning activities, and resources:

- the logical development of learning in each area;
- the geographical and cultural background of the students;
- the maturation of the students;
- the needs (including special needs), experiences, and development of the students;
- the amount of repetition that may be justified;
- the need to provide new and exciting experiences;
- the extent to which learning can be extended;
- the resources available;
- the most effective use of time, energy, and equipment.

TIME ALLOTMENT

Recommended time allotment for Exploration of Business is 30 minutes daily. The time may limit the number of objectives and/or projects which can be selected. The following flexible time allotments are recommended for the various modules:

- Career Exploration - 5-10%
- Consumerism - 10-20%
- Accounting and Data Processing - 10-20%
- Office Procedures - 10-20%
- Marketing - 10-20%
- Keyboarding (Typewriting) - 10-20%

The estimated time alloted to each module be balanced between the theoretical and practical aspects of the program.

INTEGRATION

The Exploration of Business course, in its approaches and topics, may be supportive of other programs in the school. Students may integrate studies in mathematics, science, communication, and work adjustment (human relations) with related subjects such as mathematics, science, English, and guidance. In addition, units on consumer education, career awareness, and occupational aspects may be developed from topics included in the Exploration of Business curriculum.

SELECTION OF MATERIALS

In some instances, suggested activities in the curriculum refer to approved textbooks and support materials basic to these activities. Classroom sets of selected, recommended materials are desirable. There should be a balance of materials in and among all modules. Additional recommended references for each module are included in the bibliography.

The use of a variety of resource materials enriches the experiences of students in individual and group work. Because a wide variety of textbooks and publications are available in Manitoba schools, each teacher can support instruction with current information, suitable to student needs. Recently published textbooks and support materials are in metric. Business Education teachers have been introducing metric measurements and purchasing necessary equipment and supplies since Canada's conversion to the SI system.

EVALUATION

Evaluation, part of the education process, determines whether the objectives have been met. It should assess abilities, knowledge, and progress towards some objective(s). It should be an ongoing, cooperative process of making judgments based on documented past and present experiences, aimed at influencing the direction of future learning experiences.

Students should be involved in evaluating their progress, in determining the extent and depth of objectives for the modules, and in selecting methods of evaluation.

The purposes of evaluation in a given situation vary according to needs at the time:

- assessing the attainment of an objective;
- measuring various aspects of learning (such as knowledge or values);

. discovering what students already know;
. motivating students to learn;
. providing information for guidance and counselling;
. providing a basis for curriculum change.

Stating objectives is the first and most important step in the evaluation process. They can be stated in a variety of ways, providing for cognitive, affective, and psychomotor outcomes at all levels, from simple to complex. The interrelationships among these three domains are evident. Seldom does a learning situation involve only one, and often situations involve all three.

Cognitive objectives should include all six cognitive levels. Affective objectives should help students become aware of their own values and appreciate the need for tolerance of the values of others. Psychomotor objectives should stress the process of learning rather than the product.

Objectives are most effective in evaluation when they are:

. stated in terms of desired student learning outcomes;
. consistent with the structure of the subject matter;
. realistic in terms of student abilities;
. related to learning principles;
. attentive to the needs of the learners.

The following points apply to all evaluation techniques and methods:

. The choice of evaluation procedure should reflect the purposes for which results are to be used.
. The greater the variety of evaluation techniques used, the more probable is a fair judgment.
. Motivation and achievement are affected by the type of evaluation method chosen.
. The intent of an objective and the method used to evaluate should be related.
. The procedure selected must measure the content it is chosen to measure to be sound.
. The type of subject matter taught affects the choice of evaluation techniques.
. Attitudes are more likely to be positive if students participate in reviewing objectives, selecting means of evaluation, and evaluating their own progress.
. Self-evaluation techniques enable learners to identify their own needs and to take initiative in learning.
. The effectiveness of an evaluation technique is affected by the balance among validity, reliability, and usability.

Evaluation techniques may be classified as:

. real-life situations: observational techniques or peer appraisal and self-report techniques;
. simulation techniques;
. classroom management and techniques;
. projects--ranked not only for quality, but also for showing evidence that a student appreciates the dignity of craftsmanship and takes pride in hilgh-level achievement;
. tests--written tests, oral tests, performance tests, and written exercises provide educational feedback that other techniques do not.

STUDENTS WITH SPECIAL NEEDS

Both gifted students and those with special handicaps may benefit from the Exploration of Business course. Teaching these students successfully requires a sound knowledge of their characteristics and of effective teaching methods, and a desire to release their potential for satisfying living.

Special needs may be categorized as:

- physical--deafness/hearing impairment, blindness/visual impairment, orthopedic handicap, general health impairment;
- cultural--language and experiential background effects;
- emotional--ranging from mental illness (severe) to interpersonal relationship problems (less severe);
- intellectual--general cognitive ability, with particular reference to conceptualization and abstraction.

Administrators and teachers have identified the following five areas of educational needs for special students (the degree of need varies according to the individual):

- socialization skills;
- positive self-concept development;
- daily living activities experiences;
- independence;
- employability and occupational skill development.

The following should be considered in developing a sound special needs course:

- Teachers should be as well informed about students as possible.

- Teachers should be aware of the impact of various family lifestyles.

- Teachers should apply teaching strategies and materials consonant with the students' learning strengths, weaknesses, and cognitive functioning abilities.

- Some teaching strategies are applicable for all learners, regardless of ability; e.g., reinforcement and encouragement, simple clear directions, use of examples, and fostering of a caring relationship.

- All students, regardless of handicap, need to learn to read, write, compute, make decisions and solve problems.

- Each student with a special need should be encouraged to proceed independently to the level of his/her ability, which presents a unique challenge to the teacher.

- Essential content and skills are are necessary for the handicapped student to master as for everyone else.

- Instruction for the handicapped should be as systematic as possible.

- Content should be broken down into small, discrete segments, then linked together in a logical, organized sequence. Sometimes, the teacher needs to decrease the degree of content and/or increase the number of examples to aid the low-ability learner.

- Constant reinforcement is important. Retention problems are reduced if strategies include careful task analysis, hands-on experiences, tactile demonstrations, and recognition of individual differences and needs.

- The optimal development of gifted students is encouraged by enriching the program, employing unusual and challenging teaching and motivational devices, and encouraging students to maintain established high levels of achievement.

- All students should be encouraged to experiment, innovate, search, test, and observe.

The instructional approach should stimulate the students' range of knowledge and skills, and their desire for expanding creative abilities; it should provide them with opportunities to work independently, assume responsibility, and develop leadership abilities.

- Special texts and/or simulations materials should be researched and ordered from publishers.
- Some adaptations to the physical environment may be required to accommodate special needs students.

module i: career exploration

NOTES:

This module may be treated as one separate topic for study, or its objectives can be integrated throughout the entire Exploration of Business course.

TIME:

This module comprises about 10-20% of the course, or 10-12 hours of instruction/integration.

CAREER EXPLORATION

MAJOR OBJECTIVE: To explore the significance of Exploration of Business, to gain general information about career fields and to match interests, abilities, preferences, and values to characteristics of various careers.

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Emphasize communication, mathematics, decision-making, vocabulary development, and interpersonal skills throughout Module I, Career Exploration. Make students aware that career planning is a developmental process which begins with self-awareness and knowledge of the variety of existing career options. Point out that such awareness followed by exploratory activities will provide them with a basis for making informed career decisions. Have students maintain on an ongoing basis an indexed, three-ring notebook including the following: notes, diagrams, illustrations, vocabulary, articles from newspapers and periodicals, handbooks, instruction sheets, and exercises. Discuss the purpose of maintaining a well-organized notebook, pointing out that it will help students build upon ideas gained in class.	PURPOSES OF NOTEBOOK PROJECT 1. To provide a record of learning and progress 2. To develop a source of reference information

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
A. PROGRAM OVERVIEW The student should be able to:		
1. define Exploration of Business;	Have students locate and discuss definitions for Exploration of Business. Ask them to formulate their own definition. Emphasize that Exploration of Business is an educational program which helps students to understand consumer, occupational, organizational, managerial, historical, cultural and technological aspects of business. The modules involve such activities as researching and preparing, reports and displays, viewing audio-visuals, and participating in group and individual projects; these activities provide opportunities for creativity and problem solving, and aid individuals in making informed and meaningful occupational choices.	EXPLORATION OF BUSINESS: A phase of general education which familiarizes students with processes and occupations of business as well as with the social and economic phenomena of the world of business
2. develop an understanding of the purpose of Exploration of Business;	Discuss the program goals and definition of Exploration of Business in order to relate this program to the general education of students. Point out that Exploration of Business serves three main functions: pre-vocational, exploratory, and guidance.	Exploration of Business 9, Manitoba Department of Education GOALS FOR EXPLORATION OF BUSINESS 1. Development of understanding about business and its place in our culture

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
		2. Discovery and development of talents, aptitudes, and interests of individuals for business pursuits 3. Development of understanding about business processes and the practical application of business principles to personal life skills 4. Development of problem-solving and creative abilities involving the materials, processes, activities, and records of business 5. Development of understanding about the tasks, routines, and skills found in the world of work
3. recognize the relationship between Exploration of Business and senior high school business education;	Describe the relationship between Exploration of Business and secondary school courses and programs for business education.	Curriculum guides for secondary school programs in business education Administrative Handbook for Manitoba Schools, Manitoba Department of Education
4. develop an awareness of the business education programs in the local school division/ school(s);	Discuss the business education programs available in the school division and school(s). Take students on a tour of the business education facilities.	
5. review the modules for Exploration of Business.	Name the modules that comprise Exploration of Business and prepare transparencies, charts, or handouts to provide students with information about the content of the	MODULES FOR EXPLORATION OF BUSINESS 1. Career Exploration 2. Consumerism

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	various modules. Issue a syllabus to students.	3. Accounting and Data Processing 4. Office Procedures 5. Marketing 6. Keyboarding
B. Career Classifications The student should be able to:		
1. develop an awareness of the major groups of occupations;	Outline the major occupational groups. Discuss careers, career groups or families, and career ladders. Describe the factors involved in the classification of occupations. Have students use assignment sheets based on The Canadian Classification and Dictionary of Occupations.	The Canadian Classification and Dictionary of Occupations, Department of Employment and Immigration Career Awareness Bingo Game (game), Library, Manitoba Department of Education
2. identify career groups or families;	Ask students to research and discuss the various career groups, and to note the variety of skills, levels of training or education, environmental factors, and working conditions related to each.	The Canadian Classification and Dictionary of Occupations, Department of Employment and Immigration
3. collect information about careers related to the major groups of occupations;	Encourage students to begin preparing intensive studies of selected careers in their indexed three-ring notebook.	Training Manual for Canadian Classification and Dictionary of Occupations, Volume I, Department of Employment and Immigration

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
4. identify careers related to business, office, and sales groups;	Have students search "help wanted" sections of local newspapers to classify jobs related to these groups: business, office, and sales. Have them prepare a display using these classifications. Have them view videorecordings related to business, office, and sales careers.	Business and Data Processing Machine Operations, Clerk, Bank, Insurance and Commerce Financial Business Services, Management, Retailing and Merchandising, Sales--Commodities, Sales--Services, Secretarial Services (videorecordings), Reed Career Services, Library, Manitoba Department of Education
5. recognize the importance of business, office, and sales careers.	Discuss jobs available in clerical work and sales. Invite local business people to speak about their business and what needs they serve in the community. Have students prepare research reports on secretarial, clerical, and retailing careers.	Exploring Careers in Business, Exploring Clerical Careers, Exploring Wholesaling and Retailing Careers, Exploring Accounting Careers, Exploring Data Processing Careers, Exploring Secretarial Careers, South-Western Publishing
C. CAREER AWARENESS AND DECISION MAKING		
The student should be able to:		
1. recognize the significance of making career decisions and of planning for the future;	Have students pursue activities, such as using kits, studying charts, and researching references, keeping these goals in mind:	

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	. developing self-knowledge and a self-concept, . acquiring decision-making skills, . exploring and classifying values and attitudes with respect to work, . relating educational programs to occupational requirements, . preparing for the world of work.	Vocational Decisions, Career Decisions: Finding, Getting and Keeping a Job (kits), Library, Manitoba Department of Education Some Ocupations Related to Interest and Ability In . . . (charts), Library, Manitoba Department of Education
2. identify skills and aptitudes required for specific occupations;	Discuss occupational qualifications and requirements. Have students prepare researched lists, reports, and charts on the skills and aptitudes required for specific occupations.	The Canadian Classification and Dictionary of Occupations, Department of Employment and Immigration
3. identify personal interests, abilities, needs, and goals;	Have students determine career goals by analyzing their interests, abilities, future needs, and goals in relation to these sets of opposites: . working with things or objects OR . communicating ideas about or to people . business contact with people OR . working in scientific or technical fields . routine, concrete, organized work OR . working in abstract or creative fields . working to help individuals OR . working with machines, processes, or techniques . doing work that results in respect from others OR . doing work that results in making real products	Career Values! What Really Matters to You (kit), Library, Manitoba Department of Education

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
4. match personal interests and abilities to occupational requirements.	Use audio-visuals to assist the students to match personal interests and abilities to occupational requirements.	School Guidance Counsellor Jobs and Attitudes, Why Work At All (videorecordings), Reed Career Series, Library, Manitoba Department of Education Motivation Messages (kit), Library, Manitoba Department of Education
D. OCCUPATIONAL EXPLORATION AND CAREER IDENTIFICATION The student should be able to:		
1. explain the relationship of work to society, economics, and the individual;	Discuss the dignity and value of work. Demonstrate that work influences an individual's personal, social, and economic life by introducing students to appropriate speakers, videorecordings, and research projects. Have students collect for discussion purposes information from newspapers and televison news about the influence of social and economic trends on careers.	Man, Education, and Manpower, American Association for School Administrators Careers and Lifestyles (kit), Library, Manitoba Department of Education

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
2. recognize the significance of changing and evolving technologies on careers;	Have students enhance their knowledge of the technological developments related to work by participating in various activities like these: . discussing the influences of technology on job skills, . viewing audio-visuals, . visiting businesses using automated equipment, . preparing research reports and bulletin board displays.	The Robots Are Coming, Now the Chips Are Down (videorecordings), Library, Manitoba Department of Education
3. assess individual aptitudes and interests pertinent to career clusters;	Have students assess their individual aptitudes and interests to determine their relationship to various career clusters.	Exploring Business, McGraw-Hill Ryerson, Part One, Introduction
4. develop a tentative career plan;	Have students list aptitudes and skills required for their desired career goals and prepare tentative career plans related to these goals. Have students view and discuss several audio-visual kits about various business careers.	Careers: Marketing and Distribution, Your Future in Retailing, Marketing Education Career Kit, Careers: Business and Office Procedures, A Career That Counts, A Story With a Happy Ending--Your Business Career (kits), Library, Manitoba Department of Education
5. identify a realistic educational program to fulfill career goals.	Acquaint students with the high school courses that will enable them to reach their career goals. Ask them to outline a program of study to reach their goals.	Career Direction: High School as a Tryout (kit), Library, Manitoba Department of Education

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
		BO-CEC Business and Office Careers Course Guide: Junior High and Middle Schools, National Business Education Association
E. JOB SEARCH TECHNIQUES The student should be able to:		
1. identify sources of information about jobs;	Discuss methods used to advertise jobs. Have students collect and discuss examples of job advertisements and prepare charts, posters, and/or bulletin board displays.	JOB ADVERTISEMENT SOURCES 1. School guidance counsellors 2. Canada Manpower offices 3. Employment agencies 4. Newspapers, periodicals
2. develop an understanding of the purposes of job descriptions;	Write job descriptions or obtain written samples. Have students explain the purposes of job titles and descriptions and assess the advantages and disadvantages of job descriptions.	PURPOSES OF JOB DESCRIPTIONS 1. Outline duties 2. Describe routines 3. Assign responsibility 4. Delegate authority 5. Designate accountability 6. Prevent conflicts 7. Describe general ability requirements 8. Categorize personnel 9. List expected skills and attitudes 10. State desired education

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
3. recognize the skills necessary for successful job seeking;	Emphasize that students will be expected to communicate in all career situations. Make them aware that communication begins with an application form and interview, and continues with company/business reports and interaction with customers and co-workers. Point out to students the importance of basic reading, writing, speaking, and arithmetic skills, and help them to develop these skills in all class activities.	How to Find and Apply for a Job, South-Western Publishing
4. prepare personal resumés and job applications;	Have students collect examples of resumés, letters of application, and application forms. Have them explain the purposes of resumés, letters of application, and application forms and compare their format and content. Point out that application forms and resumés often contain similar information. Ask students to write a resumé and a letter of application and complete an application form for a specific job description or advertisement.	Resumés, letters of application, application forms Choosing the Kind of Job You Want, Getting Ready, Your Calling Card (videorecording), Reed Career Series, Library, Manitoba Department of Education
5. explain the relationship of interviews to resumés, letters of application, and application forms.	As a follow-up, discuss interview processes and techniques and explain their relationship to resumés, letters of application, and application forms. Invite a personnel director, a manager from a local business, the school principal, or a teacher to conduct mock interviews in the classroom. Have students work in groups to plan and role play interviews.	Job Interview: Whom Do You Hire? Large Business, Job Interview: Whom Do You Hire? Small Business (16 mm colour films), Library, Manitoba Department of Education Job Application, You and Your Job Interview, Preparing for an Interview, Job Interview Kit, Interview Survival (kits), Library, Manitoba Department of Education

module ii: consumerism

NOTES:

Exploring "Consumerism" involves studying consumer rights under the law, consumer credit, savings and investments, financial institutions, taxation, and personal money management. "Enrichment Activities" for indepth studies of taxation and money mangement can satisfy student interest, teacher preference, time requirements, and a general assumption that these two areas are of special importance.

TIME:

This module comprises about 10-20% of the time allotted to the course, or about 11-24 hours.

CONSUMERISM

MAJOR OBJECTIVE: To explore the principles of consumer law, credit, savings and investments, banking, taxation, and money management and to apply these principles to develop consumer awareness.

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Integrate study of communications, mathematics, decision-making, vocabulary development, and interpersonal skills throughout Module II, Consumerism.	
	Review career-related information and principles in Module I, Career Exploration. Integrate and emphasize career instruction throughout the consumerism module.	Exploration of Business 9, Manitoba Department of Education, Module I Careers in Consumer Education (kit), Library, Manitoba Department of Education A Money Management Approach to Teaching Consumer Education, Saskatchewan Consumer and Commercial Affairs, Section I
A. ORIENTATION TO CONSUMERISM The student should be able to: 1. define consumerism;	Have students discuss and define consumerism.	CONSUMERISM: The act of purchasing/using goods and services

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
2. develop an awareness of the relationship between consumerism and consumers.	Have students discuss and define consumers. Emphasize that students will be involved with consumerism and that all components of consumerism are interrelated. Have students enhance their understanding of consumerism components by participating in teaching/learning strategies like these: . researching reference sources and preparing reports, . developing bulletin board displays and charts, . taking part in organized discussion groups.	CONSUMERS: Those who use goods or services produced by others Looking at the Consumer, Gage Publishing Guide to Wise Consuming: A Text-Workbook, McGraw-Hill Ryerson, Chapter 1 Business Fundamentals, McGraw-Hill Ryerson, Chapter 1
B. CONSUMER RIGHTS The student should be able to:		
1. develop an understanding of the need for consumer protection;	Have students develop a list of reasons for consumer protection based on their understanding of case studies, collected newspaper articles, and class discussion.	REASONS FOR CONSUMER PROTECTION 1. Rising prices 2. False or misleading advertising 3. Producer and retailer insensitivity to consumer needs 4. Need for ecological consideration and environmental protection 5. Need for prevention of monopolies on goods and services 6. Need for quality control of goods and services

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
		7. Need for developing and maintaining standards 8. Need for developing consumer protection legislation
2. list various government departments and other agencies that inform and protect consumers;	Acquaint students with these government departments which inform and protect consumers: . Agriculture, . Canada Mortgage and Housing, . Communications, . Consumer and Corporate Affairs, . Dominion Bureau of Statistics, . Economic Council of Canada, . Energy, Mines and Resources, . Fisheries and Forestry, . Health and Welfare, . Industry, Trade, and Commerce, . Labour, . Employment and Immigration, . National Design Council, . National Research Council, . Others. Point out that these government departments can be federal, provincial, or both federal and provincial. Point out that there are many consumer organizations and that trade, professional, and industrial associations, like some listed below, have an interest in consumer protection:	Canada Yearbook, Canada Handbook, Statistics Canada Looking at the Marketplace, Gage Publishing, Chapter 11 Canadian Consumer (periodical), October 1978

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	. Automobile Protection Association, . Better Business Bureau, . Canadian Advertising Advisory Board, . Canadian Association of Automotive Rust-protectors, . Canadian Association of Movers, . Canadian Consumers Association of Canada, . Canadian Dental Association, . Canadian Electrical Manufacturers Association, . Canadian Medical Association, . Canadian Standards Association, . Consumers' Association of Canada, . Dry Cleaners and Launderers Institute, . Urban Development Association of Canada. Have students examine various issues of "Canadian Consumer," a periodical, to locate names of other consumer organizations and consumer-related associations. Ask students to research answers to questions like these: a) Where is the nearest Better Business Bureau? b) How does one benefit from the services of the Better Business Bureau? c) Why was the Canadian Standards Association formed?	

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
3. describe the consumer protection functions of various government departments and other agencies;	Have students, individually or in groups, research and prepare illustrated reports and bulletin board displays on the consumer protection functions of government departments and other agencies. Invite available speakers from these departments and agencies to address the class. Ask students to survey their communities to determine how many government departments and other agencies offer consumer protection and information.	Looking at the Marketplace, Gage Publishing, Chapter 11 Canada Yearbook, Statistics Canada
4. develop an awareness of consumer rights and responsibilities.	Discuss and have students prepare reports on consumer rights and responsibilities.	Consumer Complaints: The Right Way (16 mm colour film), Library, Manitoba Department of Education Taking Issue, You, The Consumer: Rights, Responsibilities, Remedies, You and Your Shadow (kits), Library, Manitoba Department of Education
C. CONSUMER CREDIT The student should be able to:		
1. define credit;	Have students discuss and define credit.	CREDIT: An advance of money or goods in exchange for a promise to pay at a later date

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
2. describe how credit benefits the economy and the consumer;	Emphasize and have students find examples of these effects of credit on the economy and consumers: . promotion and production of goods and services, . assistance with providing employment, . improvement of living standards.	Exploring Business, McGraw-Hill Ryerson, Chapter 48
3. recognize the advantages and disadvantages of credit;	Emphasize that using credit is a choice which the consumer should make after evaluating individual circumstances, the need for credit, and its advantages and disadvantages. Have students read about, discuss, and list the advantages and disadvantages of credit: a) Advantages of credit: . stimulating the economy, . conveniencing the consumer, . promoting new business, . improving living standards, . allowing credit customers to make investments that save time and money, . advising credit customers of upcoming sales, . allowing customers with lower incomes to purchase goods and services, . allowing customers to possess goods and services immediately, . helping individuals and families cope with emergencies.	Exploring Business, McGraw-Hill Ryerson, Chapter 52 Looking at the Consumer, Gage Publishing, Chapter 3 Looking at Consumer Credit, Gage Publishing, Unit 3

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	b) Disadvantages of credit . over-stimulating the economy, . encouraging consumers to spend more than they can afford, . increasing total costs by using credit, . causing consumers stress and worry related to finances and debt, . encouraging consumers to buy on impulse and to commit future income, . causing consumers to stop saving for emergencies and to lose equity; . causing personal bankruptcy or garnishment of wages, . creating ill-founded purchasing expectations and a credit habit.	
4. identify sources of short-term and long-term credit;	Make students aware of the two common types of consumer credit. Discuss these types of short-term credit: charge accounts and revolving credit accounts. Have students describe these types of long-term credit: retail charge accounts with credit limits and conditional sales contracts. Point out that charge accounts and credit cards are sources of short-term credit, while retailers as well as banks, credit unions, and finance companies are sources of long-term credit.	COMMON TYPES OF CONSUMER CREDIT 1. Short-term credit 2. Long-term credit Exploring Business, Second Canadian Edition, McGraw-Hill Ryerson, Chapters 49-51 Looking at the Consumer, Gage Publishing, Chapter 3, Unit 3

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
5. develop an understanding of the cost of credit;	Acquaint students with various forms related to consumer credit by having them read the forms and discuss their content. Have students develop an understanding of the cost of credit by participating in activities like these: . completing a sample credit-card application and a conditional sales contract, . participating in a debate on the topic "Buy Now, Pay Later," . researching and calculating costs related to credit cards, conditional sales contracts, and charge accounts, . using kits and viewing audio-visuals related to consumer credit, . collecting articles from newspapers about the cost of consumer credit. Assign groups of students to collect pamphlets about the cost of credit from banks, credit unions, trust companies, and finance companies.	Consumer Credit and Information, On the Dotted Line, The Price of Credit, Consumer Defence Mechanisms, Credit: A Consumer Resource, Caveat: Consumer Education in Action, Today's Consumer Faces Value Issues (kits), Library, Manitoba Department of Education Looking at the Consumer, Gage Publishing, Chapter 3, Unit 4 Guide to Wise Consuming: A Text-Workbook, McGraw-Hill Ryerson, Chapter 11
6. recognize the significance of choosing and using credit wisely.	Review the advantages and disadvantages of credit. Emphasize the need to think seriously about choosing and using credit, especially in regard to these factors: repayment of the debt; style, quality, and durability of the product purchased; cost of buying on credit as opposed to paying at the time of purchase; the terms of the contract; and comparing terms and prices at competing businesses.	Insights into Consumerism, Learning To Be a Wise Consumer, Cases in Consumer Education (kits), Library, Manitoba Department of Education Business Fundamentals, McGraw-Hill Ryerson, Chapter 6

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
		Exploring Business, McGraw-Hill Ryerson, Chapter 53
	Have students read and discuss case studies and articles from newspapers/periodicals, view and discuss films, and use kits to enhance their knowledge of the wise use of credit.	Guide to Wise Consuming: A Text-Workbook, McGraw-Hill Ryerson, Chapter 11 Looking at Consumer Credit, Gage Publishing, Unit 7
D. SAVINGS AND INVESTMENTS The student should be able to:		
1. define savings and investments;	Have students discuss and define savings and investments.	SAVINGS: Money not needed for current expenses that is put aside for the future INVESTMENTS: Money used to earn additional money
2. recognize the importance of savings and investments;	Point out that saving and investing enables individuals to purchase high price articles without borrowing, to meet financial emergencies, and to provide future financial security.	Exploring Business, McGraw-Hill Ryerson, Chapter 54 Business Fundamentals, McGraw-Hill Ryerson, Chapter 7

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
		Looking at the Marketplace, Gage Publishing, Chapter 3, Unit 2 Guide to Wise Consuming: A Text-Workbook, McGraw-Hill Ryerson, Chapters 16-17
3. identify the common types of savings and investment opportunities.	Ask students to list the common types of savings and investment opportunities.	COMMON TYPES OF SAVINGS AND INVESTMENT OPPORTUNITIES 1. Savings account 2. Canada Savings bonds 3. Corporate stocks and bonds 4. Real estate
E. FINANCIAL INSTITUTIONS AND THE CONSUMER The student should be able to:		
1. explain the branch banking system;	Acquaint students with a definition of branch banking. Have them discuss the principle of branch banking and ask them to list the banks making up the branch banking system in Canada.	Guide to Wise Consuming: A Text-Workbook, McGraw-Hill Ryerson, Chapter 5 Business and You Series, Set I (colour filmstrips, cassettes), McGraw-Hill Ryerson BRANCH BANKING: The Canadian practice of having only a few banks, each with many branches serving the public

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
		Business Fundamentals, McGraw-Hill Ryerson, Chapter 2
	Enrichment Activities Describe the function of the Bank of Canada. Point out that as the central bank, it supervises all banking activity in Canada. Have students bring newspaper articles about the Bank of Canada to class for reading and discussion.	CHIEF DUTIES OF BANK OF CANADA 1. Issue the currency notes (bank notes) in circulation in the country 2. Regulate the amount of currency in circulation through regulating total loans by the banks, thereby influencing the economy in the best interests of the people 3. Hold the reserves the banks are required to keep against their deposits
2. identify types of financial institutions other than branch banks;	Acquaint students with these types of financial institutions, often referred to as near banks: trust companies, mortgage and loan companies, credit unions, mutual fund companies, investment clubs, insurance companies, and government savings offices. Have students identify the types of financial institutions in their communities, including branch banks.	Looking at the Marketplace, Gage Publishing, Chapter 4, Unit 1 Looking at the Consumer, Gage Publishing, Chapter 9, Unit 3
3. identify common services offered by banks and other financial institutions.	Have students discuss, research, and prepare a list of the services provided by banks and financial institutions.	Business Fundamentals, McGraw-Hill Ryerson, Chapter 2

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Invite guest speakers from banks and other financial institutions to explain the services that they offer. Enrichment Activities Identify the forms commonly used by banks and other financial institutions. Emphasize that all financial institutions follow similar procedures and require customers to complete similar forms. Have students participate in activities like these to enhance their knowledge of procedures for using and completing forms: . collecting forms used by financial institutions, . preparing labelled bulletin board displays, . studying the format and content of each form, . discussing and preparing reports on the purpose of each form, . completing each form.	Guide to Wise Consuming: A Text-Workbook, McGraw-Hill Ryerson, Chapter 5 Business Fundamentals, McGraw-Hill Ryerson, Chapter 2 Looking at the Consumer, Gage Publishing, Chapter 9, Unit 4 Exploring Business, McGraw-Hill Ryerson, Chapter 47 A Student Guide to Banking, Canadian Imperial Bank of Commerce

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
F. TAXATION AND THE CONSUMER The student should be able to:		
1. identify services provided by various levels of government;	Have students discuss, research, and list the various services provided by different levels of government.	Looking at the Marketplace, Gage Publishing, Chapter 12
2. explain how governments pay for the services provided;	Point out that consumers and businesses pay taxes to cover the cost of the services which the three levels of government provide.	Business Fundamentals, McGraw-Hill Ryerson, Chapter 13
3. identify the common types of taxation;	Have students discuss, research, and report on these common types of taxation: provincial retail sales tax, income tax, and property tax.	Business Fundamentals, McGraw-Hill Ryerson, Chapter 13 Looking at the Consumer, Gage Publishing, Chapter 9, Unit 2
	Make students aware that throughout their lives they will pay many other taxes.	Looking at the Marketplace, Gage Publishing, Chapter 12, Unit 2
4. explain the purposes of provincial retail sales tax, income tax, and property tax.	Have students discuss and research the main purposes of each type of tax: a) Provincial Retail Sales Tax--the money goes into the general revenue fund of the province to help pay for provincial government services;	Business Fundamentals, McGraw-Hill Ryerson, Chapter 13 Looking at the Marketplace, Gage Publishing, Chapter 12, Unit 2

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	b) Income Tax--a percentage of individual income is paid to the federal and provincial governments to help cover the operating expenses of the province and nation; c) Property Tax--income from this source pays for municipal/city/town services, such as schools, police and fire protection, street maintenance, parks and recreation, and libraries. <u>Enrichment Activities</u> Describe the methods used to calculate provincial retail sales tax, income tax, and property tax. Acquaint students with the methods of calculation by having them participate in activities like these: a) Provincial Retail Sales Tax: . identify the percent rate of the provincial retail sales tax for Manitoba, . prepare lists of taxable and non-taxable items, . explain the effect of the tax on the purchase price of taxable items such as bicycles,	<u>Looking at Government</u>, Gage Publishing, Unit 11

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	motorcycles, footballs, cross-country skis, stereo equipment, and microcomputers, . calculate the sales tax on a variety of items; b) Income Tax: . identify taxable income, . explain the concept of progressive tax rate, which allows the income tax rate to increase as taxable income increases, . complete a simple income tax form, given certain data; c) Property Tax: . study and discuss a property tax notice, . identify the amount of each of these items listed on the tax notice: the total tax to be paid, the assessed value of the property, the mill rate for general levy, the total taxes for education, . calculate property tax, given certain data.	

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
G. MONEY MANAGEMENT The student should be able to:		
1. develop an understanding of the need for money management;	Point out that the skill of money management must be developed through practice. Have students examine and discuss audio-visuals and case studies which lead them to realize that a sound money management program requires the identification of needs and wants and that needs and wants change throughout life. Have them differentiate between needs and wants.	Exploring Business, McGraw-Hill Ryerson, Chapter 43 Guide to Wise Consuming: A Text-Workbook, McGraw-Hill Ryerson, Chapter 3 NEEDS: Things necessary to sustain life WANTS: Things desired to enrich life
2. discuss the components of a pay cheque;	Discuss the relationship of money management to a pay cheque and have students analyze examples of various pay cheques to develop an understanding of the difference between salary and the amount received. Ask students to identify the deductions listed on pay cheques and statements of earnings and to identify the purposes of the deductions.	Money in Your Life (kit), Library, Manitoba Department of Education Your World of Money (videorecording), Library, Manitoba Department of Education Money: How Its Value Changes (16 mm colour films), Library, Manitoba Department of Education Business and You Series, Sets II-III (colour filmstrips, cassettes), McGraw-Hill Ryerson

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
3. develop an understanding of the budgeting process;	Have students discuss and define budget. Point out these budgeting principles: a) The purpose of budgeting is to improve the way in which money is spent; b) Fixed expenses should be provided for first when planning spending; c) A budget's success depends on how close actual expenditures come to estimated expenditures; d) Recording expenses provides a means of checking whether a spending plan is being followed. Have students research and discuss how budgets can help individuals, families, organizations, and businesses to live within income, to make wise choices, to look ahead, and to save or invest.	BUDGET: An estimate of income to be received and its use over a certain period of time On Your Own, Money Management Filmstrip Library, Money Well Spent, Smart Spending, Money Talks or You've Got to Have a Plan Man (kits), Library, Manitoba Department of Education Exploring Business, McGraw-Hill Ryerson, Chapters 44-45 Looking at the Consumer, Gage Publishing, Chapter 4, Unit 4 Business Fundamentals, McGraw-Hill Ryerson, Chapter 3 A Guide to Wise Consuming: A Text-Workbook, McGraw-Hill Ryerson, Chapter 4 Looking at the Marketplace, Gage Publishing, Chapters 2-3

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
4. prepare a personal budget;	Emphasize these basic steps in budgeting: a) Estimate income; b) Plan how income is to be used; c) Put the plan into action. Acquaint students with rules for preparing a weekly budget. Have them participate in activities like these: . making lists of expenses for the next two weeks and classifying expenses as fixed or flexible, . collecting examples and preparing budget forms, . selecting or designing an appropriate form for a family or an individual, . reviewing the items included in a budget, identifying areas in which comparison shopping would contribute to sound money management, and preparing a written report entitled "Comparison Shopping--An Important Aspect of Money Management," . discussing films and kits related to budgeting, . preparing a personal budget for a one-week period of time. Enrichment Activities Explain buying considerations and the relationship of income, money man-	RULES FOR PREPARING A WEEKLY BUDGET 1. Total expenses must not be larger than total income 2. Fixed expenses must be considered and listed first 3. Some savings or investments should be included in budget planning 4. Small expenses for the week should be listed 5. Small amounts for casual spending should be included The Budget as a Means to an End, Home Economics Education Association The Family Budget, Home Economics Education Association Looking at Consumer Credit, Gage Publishing, Unit 9 A Money Management Approach to Teaching Education, Saskatchewan Consumer and Commercial Affairs, Sections III, IV, V, VI Exploring Business, McGraw-Hill Ryerson, Chapter 57

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	agement, and budgeting to planning purchases. Have students discuss buying considerations that operate when planning purchases: need, suitability, cost, conservation of natural resources, effect on environment, packaging. Have students recognize the importance of buying considerations by involving them in activities like these: . preparing research reports on each of the buying considerations, . reading and discussing case studies, . forming committees to prepare bulletin board displays on buying considerations, . viewing and discussing films, . using and discussing kits. Identify places from which to purchase specific goods and services. Discuss the relationship of income, money management, budget-	Choosing What to Buy, Consumer Economics and You (16 mm colour films), Library, Manitoba Department of Education Looking For Me: Understanding Consumer Behaviour in the Market Place (kit), Library, Manlitoba Department of Education Exploring Business, McGraw-Hill Ryerson, Chapter 58

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	ing, and planning purchases to the task of selecting businesses from which to purchase goods and services.	
	Acquaint students with categories of stores and ask them to list and classify stores located in their shopping areas.	Let's Go Shopping (kit), Library, Manitoba Department of Education
	Have students identify and discuss alternative sources from which to make purchases: vending machines, second-hand outlets, wholesale outlets, catalogues, garage sales, newspaper classified advertisements, and door to door salespeople, among others.	
	Make students aware of the time factor in planning purchases by discussing the advantages and disadvantages of buying goods on sale and/or at regular price.	Exploring Business, McGraw-Hill Ryerson, Chapter 59
	Have students analyze the impact of advertising by discussing its aims:	Exploring Business, McGraw-Hill Ryerson, Chapters 60, 64
	. creating desire in the consumer for the product,	Looking at the Marketplace, Gage Publishing, Chapter 8-9

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	. mobilizing the consumer to buy the product. Make students aware of the impact of advertising by having them participate in teaching/learning activities like these: . listing and discussing the advantages and disadvantages of advertising, . identifying various types of advertising including in-store promotions and packaging, . selecting several magazine advertisements that appear to be fair to the consumer, . analyzing advertisements to determine appeals used to attract attention, . preparing a list of familiar consumer products (including such items as facial tissues, toothpaste, coffee, blue jeans, microcomputers and cars), conducting a survey having students and teachers identify the first word that comes to mind when the product is mentioned, reviewing the results and writing a report entitled "The Consumer and Advertising Effectiveness",	Advertising and Consumer Motivations, Advertising and the Consumer, Advertising Messages and You, Getting Down to Basics . . . About Advertising, A Resource Kit for Teaching Consumer Education (kits), Library, Manitoba Department of Education

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	. listing products commonly advertised in various media such as television, radio, magazines, billboards, and newspapers, . researching reference sources, conducting surveys and preparing reports and displays on advertising restrictions and misleading advertising, . checking consumer ratings of products, . explaining the influence of inflation on purchasing. Have students report on the various brand names and labels, explaining their function in developing an approach to purchasing. Provide opportunities for students to work with kits, view films, and discuss both. Ask students to work in groups to prepare lists of helpful shopping tips for various types of consumer goods.	TV Ads--our Mini-Myths (16 mm colour film), Library, Manitoba Department of Education Bait, Bite, and Switch (16 mm colour film), Library, Manitoba Department of Education On Your Own!, Alice in Consumerland, Consumer Education: The Price is Right or Is It?, Be a Better Shopper: Buying in Supermarkets, To Buy or Not To Buy, Let's Go Shopping, Buyer Beware, Consumer Education: Buyer Be Wise, Consumer Education Part I: How To Shop Wisely, Consumer Education Part II: Managing Your Money, Decision Making for Consumers, Meaning of a Label (kit), Library, Manitoba Department of Education Inflation, Inflation: Passing the Buck, Brand Names and Labelling Games (16 mm colour film), Library, Manitoba Department of Education
5. develop an approach to purchasing.	Discuss the relationship of income, money management, and budgeting to developing an approach to purchasing.	Exploring Business, McGraw-Hill Ryerson, Chapters 61-62

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Acquaint students with these steps in developing an approach to purchasing: . determining if the purchase should be made, . obtaining information about the product, . assessing advertisements, . reading articles about the product, . surveying catalogues, . carrying out comparison window shopping, . visiting stores to investigate the product thoroughly. Make students aware of the importance of considering questions like these every time they consider buying on credit: a) Do I need this item? b) Why am I buying this? c) Could I wait to buy this until I have saved the cash? d) Do I know exactly how much the item and the credit will cost me? e) Could I buy either the item or the credit cheaper somewhere else? f) Will this still have value after I have finished paying for it? g) Is there an alternate way to spend this money which would bring more satisfaction or have more utility? h) Will I have to sacrifice something more important to pay for this? i) Is the income I plan to use to make the payments relatively secure for the duration of the payments?	Looking at the Consumer, Gage Publishing, Chapters 5-8 Business Fundamentals, McGraw-Hill Ryerson, Chapter 5 A Guide to Wise Consuming: A Text-Workbook, McGraw-Hill Ryerson, Chapters 6-10 Consumer Choice (colour filmstrips, cassettes, guide, student worksheets), Educational Services

module iii: accounting and data processing

NOTES:

Generally, this module should provide a basic awareness of debits, credits, record keeping, careers, and processing data both manually and electronically. Indepth introductions to special ledgers, journals, balance sheets, and income statements are cited as "Enrichment Activities," optional to the implementation. Teachers may use the outlined "Enrichment Activities" for students demonstrating advanced abilities or special interests.

TIME:

This module comprises 10-20% of the course, or about 11-24 hours. "Enrichment Activities" should be attempted only when time permits or when indepth emphasis is desired and extra time assigned from other modules.

III. ACCOUNTING AND DATA PROCESSING

MAJOR OBJECTIVE: To explore career opportunities in accounting and data processing, to recognize their significance to individuals and businesses, and to develop an understanding of their introductory principles and application.

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
A. CAREERS IN ACCOUNTING AND DATA PROCESSING	Integrate study of communications, mathematics, decision-making, vocabulary development, and interpersonal skills throughout Module III, Accounting and Data Processing. Make students aware of the personal and vocational applications of accounting and data processing by involving them in discussions and research and reading assignments. Review career-related information in Module I, Career Exploration. Integrate and emphasize career instruction throughout this module by familiarizing students with various accounting and data processing careers and by allowing them to evaluate themselves in relation to these various career opportunities, thus providing them with a basis on which to make career choices.	

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
The student should be able to:		
1. recognize the importance of accounting;	Emphasize that accounting helps individuals to keep records of money earned and spent, thus aiding them in financial planning and in preparing budgets and income tax returns. Make students aware that businesses need to keep various financial records, which accurately note how much they owe, how much they are owed, what they own, and what they pay employees. Point out that these records help people operate their businesses wisely, telling them if they are making enough money to stay in business and helping them to make business-related decisions.	Exploring Business, McGraw-Hill Ryerson, Chapter 31 Exploring Accounting Careers, South-Western Publishing, pp. 1-3
2. discuss and define accounting;	Have students discuss and define accounting.	ACCOUNTING: Orderly business information about money taken in and paid out and about the financial health of the business
3. develop an awareness of common job titles in the accounting and data processing families of occupations;	Have students use reference sources and "help wanted" columns in daily newspapers to develop a list of accounting job titles.	Canadian Classification and Dictionary of Occupations, Department of Employment and Immigration, Canada Exploring Accounting Careers, South-Western Publishing, inside back cover

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
		Exploring Business, McGraw-Hill Ryerson, Chapter 31
	Have students participate in activities like these:	
	. touring offices, including school and school division offices,	
	. collecting pictures of business buildings and offices,	Pictures of accounting offices
	. listing words describing feelings about offices visited or examined in pictures,	
	. preparing displays of pictures of accounting/data processing offices,	
	. viewing and discussing transparencies/ diagrams of office floor plans or preparing floor plans of offices visited,	Floor plans of offices
	. relating the floor plans to the flow of work,	
	. collecting pictures for a bulletin board display of equipment, including microcomputers and furniture used in an accounting/data processing office or work station,	
	. viewing and discussing videorecordings, films, and slides of accounting and data processing work stations,	
	. organizing notebook sections to include pictures, sample forms, job titles and descriptions related to accounting and data processing.	Financial Business Services (videorecording), Reed Career Series, Library, Manitoba Department of Education

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
4. identify accounting and data processing jobs in the local community;	Ask students to list the businesses in the local community noting the accounting/data processing jobs in these businesses.	Telephone directory Newspapers
5. develop an understanding of the work environment for accounting and data processing jobs;	Point out that learning about places where people do accounting/data processing work is a first step in career exploration and that the work space will be different in each place examined.	
6. list skills, abilities, and personal traits generally useful in various accounting and data processing jobs;	Emphasize that accounting/data processing jobs require special basic skills and abilities that can be learned in school and on the job. Have students discuss accounting/data processing job descriptions from different companies, read career reference books, career stories, and the textbook, view audio-visuals, and talk with people who work in accounting and data processing jobs. Have students list the many different skills, abilities, and personal traits needed by accounting/data workers.	Careers in Business, National Association of Business Education, pp. 29-31 Canadian Classification and Dictionary of Occupations, Department of Employment and Immigration, Canada Exploring Business, Second Canadian Edition, McGraw-Hill Ryerson, Chapter 31 Exploring Accounting Careers, South-Western Publishing General Record Keeping, McGraw-Hill Ryerson, Chapters 1-2 Exploring Data Processing Careers, South-Western Publishing, pp. 23-50

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
7. develop an awareness of secondary and post-secondary education related to accounting and data processing careers.	Point out that accounting and data processing courses are available in secondary schools, community colleges and universities. Show students the textbooks, forms, and equipment used in these classes in secondary schools. Invite an accounting/data processing teacher and/or a student from the secondary school to speak to the Exploration of Business class.	Accounting 202, 302, Manitoba Department of Education Curriculum guides
	Acquaint students with post-secondary education in accounting and data processing by obtaining calendars or brochures from community colleges, universities, and professional organizations for a reference corner or display in the classroom.	Calendars and brochures from community colleges and universities PROFESSIONAL ACCOUNTING ASSOCIATIONS 1. Registered Industrial Accountants 2. Canadian General Accountants 3. Chartered Accountants
B. BASIC CONCEPTS IN ACCOUNTING The student should be able to:		
1. explain the need for financial records and accounting systems;	Review the definition of accounting. Discuss the reasons for personal, business, financial, and accounting records. Point out that records and reports allow information regarding the success or failure of the business to be assessed.	

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
2. describe and use the basic accounting principles for starting an accounting system;	Emphasize that both management and interested others use records and reports to make business decisions. Show students how to use accounting records to calculate the financial worth of an individual. Have them supply information which can be recorded on a chalkboard/overhead transparency to determine the financial worth of a fictitious student. Ask students to prepare the same statement in their notebooks and to deduce a basic accounting formula. Have students determine the financial worth of the fictitious student who owns all the items with a total value of $1832.00, but also owes a friend $10.00. Ask them to explain how they determined the financial worth of the student and encourage them to deduce the related basic accounting formula Discuss the information required to start an accounting system for a business: . what the business owns, . what the business owes, . what the financial worth of the business is.	FINANCIAL WORTH OF A HIGH SCHOOL STUDENT Money in pocket $ 2.00 Cash in bank 30.00 Clothes 400.00 Bicycle 300.00 Stereo equipment 750.00 Record collection 350.00 $1832.00 Owns = Financial Worth of an Individual Owns - Owes = Net Financial Worth of an Individual

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Demonstrate preparing a step-by-step statement similar to the following example entitled "Financial Worth of a Small Business," while students prepare the same statement in their notebooks: FINANCIAL WORTH OF A SMALL BUSINESS What Is Owned / What is Owed Cash $1000.00 — Supply Company $100.00 Supplies 200.00 — Equipment Company 500.00 Equipment 900.00 Total Owned $2100.00 — $600.00 Ask students to explain a method for calculating the financial worth of the business and to determine the basic accounting equation, "Owns-Owes = Net Financial Worth."	ACCOUNTING EQUATION A = L + OE (Assets) = (Liabilities) + (Owner's Equity)
3. classify assets, liabilities, and owner's equity;	Refer to the accounting equation while discussing assets, liabilities, and owner's equity. Ask students to identify items of value that a person or business owns. Have students write the term assets under the word owns in the basic accounting equation. Have them list some of their assets. Ask students for the term that matches the definition "items that a person or business	Exploring Business, McGraw-Hill Ryerson, Chapter 32 Owns - Owes = Net Financial Worth ↓ Assets

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	owes." Have students write the term liabilities under the word owes in the basic accounting equation and ask them to list some of their liabilities. Explain that debts and liabilities mean essentially the same thing, but business people and accountants more often use the term liabilities. Point out that one item remains in the equation and explain that the net financial worth of a business is the claim of the owner against the assets. Emphasize that owner's equity is the accounting term for the owner's claim and ask students to write owner's equity under the words net financial worth in the basic accounting equation. Explain the relationship of these terms: ownership, proprietorship, capital, net worth, owner's equity. Ask students to suggest other ways to express the accounting equation. Write the equations on the chalkboard as they are developed. Write the simple arithmetic equation, 4-1=3, on the chalkboard if students are unable to suggest other equations. Lead students to the realization that this equation can be written as 1+3=4 or 4=1+3. Relate the term assets to the "4," liabilities to the "1," and owner's equity to the "3" in the arithmetic	General Record Keeping, McGraw-Hill Ryerson, Chapter 6 Owns - Owes = Net Financial Worth ↘ Assets - Liabilities Owns - Owes = Net Financial Worth ↘ Assets - Liabilities = Owner's Equity

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	equation, 4=1+3. Emphasize that the accounting equation is: Assets = Liabilities + Owner's Equity.	
4. classify as an asset or a liability each item from a random list of assets and liabilities;	Give students random lists of asset and liability items and ask them to classify each of the items as an Asset (A) or a Liability (L). Drill students on the classification of assets and liabilities.	
5. calculate total assets and total liabilities; 6. determine owner's equity;	Give students lists of assets and liabilities with values for each; have students calculate the value of total assets, total liabilities, and owner's equity using the accounting equation.	
7. determine, when given two elements, the missing element in the fundamental accounting equation;	Review the fundamental accounting equation, helping students to understand rather than memorize it. Give students simple problems related to the equation to solve mentally. Have them solve more difficult problems in written format. Enrichment Activities Emphasize that generally an accounting system of any kind begins with the preparation of a balance sheet. Have students analyze balance sheets	ACCOUNTING EQUATION Assets = Liabilities + Owner's Equity A = L + OE Exploring Business, McGraw-Hill Ryerson, Chapter 33

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	from overhead transparencies, charts, and textbook illustrations. Have students use the ledger account form/T-account form of the balance sheet. (The ledger account form stresses the equilibrium principle fundamental to all accounting; the account/T-account form of the balance sheet has left-hand and right-hand sides that correspond to the accounting equation, A = L + OE.) Demonstrate step-by-step the correct format for completing a balance sheet. Have students follow the same procedure, correctly completing a balance sheet on accounting paper for insertion in notebooks. Encourage students to interpret given balance sheets by answering questions about them. Prepare a list on the chalkboard of what is contained in the balance sheet. Use questions, like those immediately following, to obtain an-	General Record Keeping, McGraw-Hill Ryerson, Chapter 6 Canadian Record Keeping and Business Procedures, McGraw-Hill Ryerson, Chapter XX

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	swers, like those following below: a) What is the first section of the balance sheet? b) What is contained in the heading? c) What is the second section of the balance sheet? d) Can parts of the fundamental accounting equation be located in the body of the balance sheet? e) What is the total of the assets on the left side? f) When the liabilities and owner's equity are added what is the total on the right side? Suggested answers: a) the heading, b) - name of individual or business (who?), - name of form (balance sheet) (what?), - date of the balance sheet (when?), c) the body, d) assets, liabilities, owner's equity.	

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Emphasize that the two sides of the sheet are in balance, thus the name balance sheet. Point out that the two sides must be in balance and equal to each other just as in the fundamental accounting equation. Illustrate the relationship between the fundamental accounting equation and the balance sheet.	
8. develop an understanding of the purpose of income statements.	Point out that a balance sheet and an income statement provide financial information about a business to owners, management, creditors, and government. Emphasize that the main purpose of the income statement is to show operating results for a business over a period of time. Make students aware of these concepts related to income statements: a) A careful record of all revenue and all expenses is necessary to find out if a business is operating at a profit; b) Net income results when revenue of a business is greater than total expenses; c) Net income is calculated by subtracting total expenses from total revenue;	

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	d) Net loss occurs when total expenses are greater than total revenue. Show students samples of income statements. <u>Enrichment Activities</u> Prepare an income statement in a step-by-step presentation and have students prepare the same income statement in their note-books. Stress the following steps in preparing an income statement: a) Write the main heading to answer these questions: who? what? for what period of time and date?; b) Prepare the revenue section; c) Prepare the expenses; d) Calculate the net income (net loss); e) Rule the income statement. Present students with various revenue and expense data to be used in the preparation of income statements. Emphasize the need for neat and accurate work.	

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
C. <u>CHANGES IN THE ACCOUNTING EQUATION</u> The student should be able to: 1. identify, analyze, and record increases and decreases in the fundamental elements (assets, liabilities, owner's equity, revenue, and expenses) resulting from business transactions;	Point out, using the balance sheet and the fundamental accounting equation, that the assets, liabilities, and owner's equity each have a "natural" side--the left (debit) side for assets and the right (credit) side for liabilities and owner's equity. The first rules for making changes in accounts can be given as follows: a) Increase any account by recording the amount of the change on the natural side for the particular item; b) Decrease any account by recording the amount of the change opposite the natural side for the particular item. Point out the relationship of rules to the various types of accounts and the accounting equation. Have students discuss the following "Summary of Rules for Debits and Credits":	

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES

SUMMARY OF RULES FOR DEBITS AND CREDITS

ANY { ASSET, COST, EXPENSE }	ANY { LIABILITY, INCOME, OWNER'S EQUITY }
DR (+) CR (-)	DR (-) CR (+)

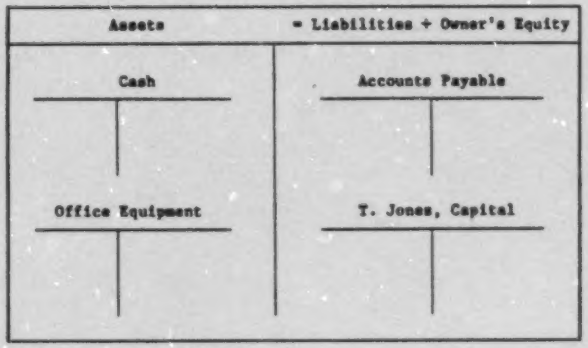
SUMMARY OF RULES FOR DEBITS AND CREDITS

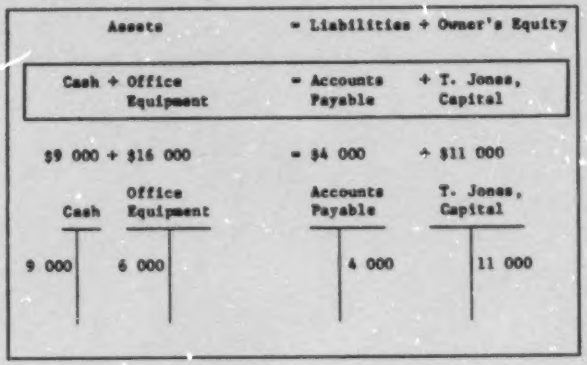
ASSETS = LIABILITIES + OWNER'S EQUITY					
ASSET ACCOUNTS		LIABILITY ACCOUNTS			
INCREASED DEBITS (+)	DECREASED CREDITS (-)	DECREASED DEBITS (-)	INCREASED CREDITS (+)		
		OWNER'S EQUITY ACCOUNTS			
		DECREASED DEBITS (-)	INCREASED CREDITS (+)		
		EXPENSES		INCOME	
		INC. DEBITS (+)	DEC. CREDITS (-)	DEC. DEBITS (-)	INC. CREDITS (+)

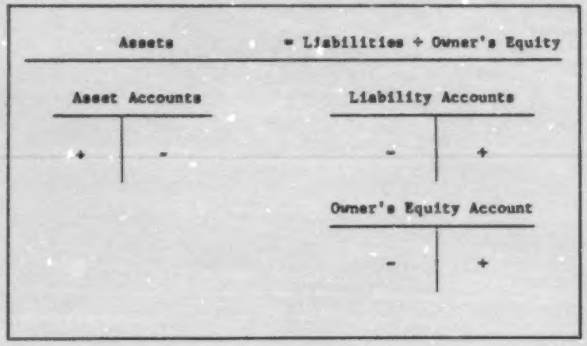
TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Proceed from the summary of rules for debits and credits to a discussion of the basic principles of debit and credit. Prepare a transparency or have students prepare a classroom chart of the basic principles of debit and credit; have them copy the principles in their notebooks for use as a reference source. **Enrichment Activities** Ask able students to summarize the results of changes in assets, liabilities, owner's equity, revenue, and expenses by preparing balance sheets and income statements. Emphasize the importance and purpose of the balance sheet and the income statement. Review the format of the balance sheet. Demonstrate the correct format of each financial statement on the chalkboard or overhead transparency.	**BASIC PRINCIPLES OF DEBIT AND CREDIT** 1. Asset accounts have debit balances 2. Liability accounts have credit balances 3. The proprietor's capital account (the owner's equity) has a credit balance 4. Revenue accounts have credit balances 5. Expense accounts have debit balances 6. The increase side of any account is its balance side 7. The decrease side of any account is the side opposite the balance side Textbook, and charts, posters, and transparencies illustrating the correct format of each financial statement

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Have students follow the demonstration by completing each type of statement on ruled accounting paper for insertion in notebooks.	
2. interpret and analyze financial statements.	Collect or prepare financial statements from/for service companies and organizations (school clubs) of interest to students. Ask students to answer questions related to the total value of assets, the date of the balance sheet, the fiscal period, and the total expenses. Seek opportunities to use open-ended questions, such as, "What would happen if . . .?"	Financial statements or examples of financial statements from textbooks Case studies about balance sheets and income statements
D. LEDGER ACCOUNTS (T-ACCOUNTS) The student should be able to:		
1. explain the purpose of ledger accounts;	Make students aware of the purpose of ledger accounts. Illustrate that recording changes directly into the accounting equation and the balance sheet is inefficient. Emphasize that an account is a device for recording the effects of transactions under one title.	

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
2. explain the relationship of each ledger account to the accounting equation;	Develop examples of this relationship on the chalkboard or overhead transparency:	





TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
3. apply the principles of debit and credit to accounts (assets, liabilities, and owner's equity);	Have students analyze transactions and identify accounts to be debited and credited.  Have students use an analysis chart like the one following to apply the principles of debit and credit to balance sheet accounts.	

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES

ANALYSIS CHART

Transaction	Accounting Principle	Accounting Entry
Paid $1 000. cash for office equipment.	To increase an asset, debt the account. To increase an asset, credit the account.	Debit: Office Equipment Credit: Cash

Office Equipment

Debit	Credit
$1 000.	

Cash

Debit	Credit
	$1 000.

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
4. show increases and decreases in asset, liability, and owner's equity accounts;	Illustrate the concepts and procedures of recording changes in asset, liability, and owner's equity accounts by using simulated account forms called T-accounts. Place T-accounts in columns to assist students to visualize the equality of debits and credits in the transaction being analyzed. Have students complete in their notebooks the same examples of these concepts and procedures. Drill the class on these concepts: a) Asset accounts have debit balances; b) Liability accounts have credit balances; c) Capital accounts (owner's equity) have credit balances; d) The increase side of an account is the balance side; e) The decrease side of an account is opposite the balance side. Prepare flash cards/slides for asset accounts and for liabilityl accounts. <u>Enrichment Activities</u> Have students analyze transactions and identify accounts to be	

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	debited and credited, using an analysis chart. Have them apply the principles of debit and credit to income statement accounts, using an analysis chart.	
5. show increases and decreases in revenue and expense accounts.	Illustrate the concepts and procedures of recording changes in revenue and expense accounts by using simulated account forms called T-accounts. Place T-accounts in columns to assist students to visualize the equality of debits and credits in the transaction. Prepare flash cards/slides for revenue accounts and expense accounts. Drill the class on these concepts: a) Asset accounts have debit balances; b) Liability accounts have credit balances; c) Capital accounts (owner's equity) have credit balances; d) Revenue accounts have credit balances; e) Expense accounts have debit balances; f) The increase side of any account is its balance; g) The decrease side of any account is opposite the balance side.	

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
E. JOURNAL The student should be able to: 1. understand the importance of a journal.	Explain why business transactions should be recorded in a journal. Emphasize these points: . the need for a chronological record of business transactions to present the daily history of the business, . the need for complete information, . the need for an effective means of locating errors, . the need for a system of providing evidence of transactions if source documents are lost. Enrichment Activities Discuss the relationship of source documents to journal entries. Have students prepare a display of various source documents from which entries are made. Use familiar transactions from problems completed in previous sections.	

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Explain the nature of the journal entry in terms of changes in the accounting equation and in the ledger account/T-account. Have students analyze each transaction in relation to source documents, the accounting equation and the ledger account/T-account. Provide students with an analysis sheet on which to record each transaction before preparing the journal entry. Discontinue the analysis sheet after students understand the use and sequence of analyzing the transaction in relation to the accounting equation and the ledger accounts/T-accounts before recording the journal entry. Record entries in journal form on the chalkboard or a transparency. Have students neatly record the same entries in their notebooks.	

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Stress the correct procedure and sequence of recording entries in the journal. Prepare a chart/transparency of "Procedure and Sequence of Recording Journal Entries." Stress that when one account is debited for an amount, some other account is credited for the same amount. Use simple examples. Stress understanding, not memorization. Use written and oral drills to strengthen the concepts of journalizing. Have students assist with the preparation of flash cards, overhead transparencies, and write-on slides to be used in developing their understanding of debit and credit concepts in journalizing. Have students follow appropriate checking and correcting procedures for preparing accounting proofs for the journal.	PROCEDURE AND SEQUENCE OF RECORDING JOURNAL ENTRIES 1. Note the date of the source document 2. Record debit account title at the date margin 3. Record the amount in the debit column (left-hand column) 4. Record credit account title a half inch from the date margin 5. Record the account in the credit column (right-hand column) 6. Record the explanation of the transaction Flash cards, overhead transparencies, write-on slides Poster-size flash cards, with transactions printed in large letters on one side and solutions on the other side

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Have students check the mathematical accuracy of the equality of debit and credit columns in the general journal. Illustrate and discuss the use of 'pinhead' footings.	
F. LEDGER The student should be able to: 1. understand the purposes of the ledger.	Explain and have the students discuss the purposes of the ledger. Prepare a chart/transparency of the purposes of the ledger for discussion and review.	PURPOSES OF THE LEDGER 1. To sort the journal entries into accounts 2. To summarize the effect of transactions on accounts 3. To show in one place the total amount of each account 4. To supply account balances for preparation of up-to-date balance sheets and income statements

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Enrichment Activities Have students prepare a chart of accounts. Stress the following points: a) The chart of accounts outlines the order of accounts in the ledger; b) The accounts in the chart of accounts are arranged in the same order as they appear on financial reports to make them easy to locate; c) The chart of accounts serves as a guide in journalizing by identifying the account titles to be used when recording business transactions. Explain how and why ledger accounts are numbered. Emphasize that the systems for numbering accounts vary with the type of business. Discuss and illustrate the format of various types of ledger accounts, explaining the purpose of each. Have students prepare a bulletin board display.	**CHART OF ACCOUNTS** Assets 101 through 199 Liability 201 through 299 Owner's Equity 301 through 399 Revenue 401 through 499 Expenses 501 through 599

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Have students follow appropriate checking and correcting procedures for preparing accounting proofs for a ledger account balance. Have them use calculators to check the mathematical accuracy of ledger account balances. Stress this generally accepted accounting principle: The balance of an account normally appears on the side of origin, the same side on which it shows in the accounting equation. Prepare a poster, illustration, or transparency to illustrate this accounting principle following this format: Class of Account — Type of Final Balance Normally Shown Assets — Debit balance Liabilities — Credit balance Owner's Equity — Credit balance Revenue — Credit balance Expense — Debit balance	

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Demonstrate the steps for posting journal entries into appropriate ledger accounts, with cross-references for each entry. Use the chalkboard and a transparency (journal on the chalkboard and ledger accounts on the transparency) to demonstrate the posting procedure. Have students complete the same procedures, using journals and using notebooks for ledger accounts. Stress neat, accurate work, and the importance of cross-referencing. Prepare a chart giving the order of posting or have students record this information in their notebooks to develop their understanding of posting from journal to ledger. Demonstrate and discuss the steps for calculating balances for ledger accounts after entries have been posted. Have students complete the same calculations. Emphasize the use of a sharp pencil and "pinhead" numbers in footing and balancing accounts.	<u>ORDER OF POSTING</u> 1. Locate the ledger account for the first debit in the journal entry 2. Enter the date of the journal entry in the date column on the debit side of the ledger account 3. Enter an explanation if one is needed to explain the entry 4. Enter the journal initial and the page number in the posting reference column 5. Enter the debit amount in the debit money column 6. Enter the number of the account in the posting reference column of the journal to show that the information has been posted 7. Locate the ledger account for the next entry which, if a credit, requires the same procedure on the credit side of the account <u>STEPS IN BALANCING AN ACCOUNT</u> 1. Foot the debit column 2. Foot the credit column 3. Subtract the smaller footing from the larger footing to verify the account balance Textbook and business examples of footing and balancing accounts

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
G. <u>TRIAL BALANCE AND FINANCIAL STATEMENT</u> The student should be able to: 1. understand the purpose of a trial balance.	Emphasize the need for determining the accuracy of postings from the journal to the ledger by proving the equality of debits and credits in the ledger. Discuss the following points: a) Each entry in the journal is a double entry containing one or more debits and credits; debit entries are posted to accounts in the ledger different from those to which corresponding credit entries are posted; b) The debits and credits should be equal in the journal and if the amounts are all correctly transferred to the ledger the total of the debit entries in the ledger will equal the total of the credit entries; c) The device for verifying the accuracy of the posting from the journal to the ledger is the trial balance--a preliminary or trial adding of all amounts in the ledger to test the equality of all debit entries to all credit entries.	<u>USES OF A TRIAL BALANCE</u> 1. Proof that ledger is in balance 2. Step toward finding the profit or loss of a business

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Emphasize the logic of the steps for preparing an accurate trial balance. Point out that a trial balance can be prepared at any time: daily, weekly, monthly. **Enrichment Activities** Demonstrate the preparation of a trial balance from a previously completed ledger or a teacher-prepared ledger. Have students work along, following the step-by-step demonstration. Take the class through five basic steps in demonstrating the preparation of a trial balance. Prepare a chart of the basic steps. Have students compare the three items in the heading of the trial balance with the items in the heading of the balance sheet.	**LOGICAL STEPS FOR AN ACCURATE TRIAL BALANCE** 1. Prepare proof of each journal page 2. Prepare proof of each account balance in the ledger 3. Copy account titles, account numbers, and balances in proper form 4. Add the trial balance and check the accuracy of totals **BASIC STEPS FOR PREPARING A TRIAL BALANCE** 1. Write the heading: - name of organization/business - title of form (trial balance) - date of trial balance 2. Enter in the trial balance each account in the ledger (name and balance) 3. Rule a single line across both columns

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Demonstrate procedure for making an entry and then ask a student to demonstrate the same procedure. Point out that the single line in accounting indicates that all the amounts above the line are to be totalled. Explain that the trial balance is in balance when the two totals are equal. Point out that a double ruling in accounting indicates that work above the double line is complete and correct. Emphasize that a balanced trial balance proves only that the debits in the ledger equal the credits; it does not prove the complete accuracy of the accounting records. Have students prepare a "quick trial balance" using the zero-proof method with a calculator and tape. Discuss and prepare a chart of sources of errors in posting.	4. Add each amount column 5. Rule a double line across the amount columns <u>SOURCES OF POSTING ERRORS</u> 1. Entire transaction not posted 2. Either the debit or credit part of a transaction not posted

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Explain methods of identifying and correcting errors in trial balances. Have students work with trial balances containing errors. Prepare a chart listing methods to locate and correct errors to servae as a reference and review source.	3. Posting to the correct side but to the wrong account 4. Posting to the wrong side of an account 5. Calculating balance incorrectly 6. Transposing figures METHODS TO LOCATE AND CORRECT ERRORS 1. Re-add both sides of the trial balance 2. Find the difference between the totals of the trial balance columns, and check the ledger to determine if the difference is an account balance omitted from the trial balance 3. Divide the difference between the two totals of the trial balance by 2, and check the accounts to see if this amount has been recorded on the wrong side 4. Divide the difference between the two totals of the trial balance by 9, and if the difference is divisible by 9, check transposition of numbers 5. Compare the balances on the trial balance with balances in ledger accounts 6. Check the pencil footings and the account balance in the ledger 7. Verify the posting of each item in the journal

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Classify the types of accounts in the trial balance and name the normal side of each account balance. Drill students on the classification of accounts and the debit and credit nature of the account balances. Review the format, principles, and concepts related to balance sheets and income statements. Have students use data from trial balances to prepare balance sheets and income statements.	
H. <u>ACCOUNTS RECEIVABLE AND ACCOUNTS PAYABLE</u> The student should be able to: 1. define <u>accounts receivable</u>;	Discuss with examples and have students define <u>accounts receivable</u>.	<u>ACCOUNTS RECEIVABLE</u>: Money a business is to receive from customers who bought goods and services on a charge-account basis, and who have not yet paid in full

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
2. explain, prepare, and verify source documents;	Point out that a credit sale is documented by several copies of an invoice, and that one of the duties of an accounting clerk is to verify the invoice before entering the sale in the accounting records. Acquaint students with procedures related to invoices by having them participate in activities like these: . collecting and comparing various types of invoices, . identifying and explaining parts of an invoice, . preparing displays of invoices, . preparing invoices, . verifying invoices by following procedures. Explain that another source document will be cheques received from customers in payment of invoices.	PROCEDURES FOR VERIFYING INVOICES 1. Multiplying unit price by number of items sold 2. Adding extensions 3. Recalculating taxes 4. Verifying final total 5. Verifying name and address 6. Verifying dates and terms

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Enrichment Activities Emphasize these concepts related to the accounts receivable ledger: a) The ledger contains an account for each customer; b) Each account shows the customer's name and address, the date and explanation of each transaction, the amount debited or credited, and the balance after each entry; c) The amount of the customer's invoice is entered into the debit column of the account; d) The amount of the payment made by the customer is entered into the credit column of the account; e) The balance of the customer's account is increased each time an additional invoice is recorded and decreased each time the customer pays part or all of the balance. Demonstrate step-by-step the procedures for making entries in an accounts receivable ledger, and have students follow these procedures. Emphasize the need for neat and accurate records.	Exploring Business, McGraw-Hill Ryerson, Chapter 39 Exploring Accounting Careers, South-Western Publishing, Project 4-2

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Explain the relationship between the accounts receivable ledger and the schedule of accounts receivable. Acquaint students with the format of the schedule of accounts receivable by showing them examples, demonstrating preparation procedures, and having them use the procedures to complete several schedules.	
3. define <u>accounts payable</u>.	Discuss with examples and have students define <u>accounts payable</u>.	<u>ACCOUNTS PAYABLE</u>: Money to be paid by a business to suppliers of goods purchased on a charge account basis
	<u>Enrichment Activities</u> Emphasize these concepts related to the accounts payable ledger: a) The ledger contains an account for each supplier/creditor; b) Each account shows the creditor's name and address, the date and explanation of each transaction, the amount debited or credited, and the balance after each entry; c) The amount of the supplier's/creditor's invoice is entered into the credit column of the account, indicating that the	<u>Exploring Business</u>, McGraw-Hill Ryerson, Chapter 40

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	liability/debt owed to the creditor has increased (the source document for which is an invoice authorized for payment); d) the amount of payment made to the supplier/creditor is entered into the debit column of the account, indicating that the debt/liability owed to the supplier has decreased (the source document for which is a cheque stub). Demonstrate step-by-step procedures for making entries in an accounts payable ledger and have students follow these procedures. Emphasize the need for neat and accurate records. Explain the relationship between the accounts payable ledger and the schedule of accounts payable. Acquaint students with the format of the accounts payable schedule by showing them examples, demonstrating preparation procedures, and having them use the procedures to complete several schedules.	<u>Exploring Accounting Careers</u>, South-Western Publishing, Projects 2-2, 4-3, 4-4

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
I. DATA PROCESSING The student should be able to: 1. define data processing;	Have students discuss and define data processing. Point out that data is information, processing is handling, and that data processing is, therefore, the handling of information. Point out that data attempts to represent information with reasonable accuracy, but that it is often inadequate for the following reasons: a) The rules for interpretation may not be defined; b) The rules may be inadequate for the required task; c) The data may contain mistakes; d) The significance of the data and the rules for interpretation may change, or there may be several sets of rules; e) The same data may be interpreted differently by people with different personalities or beliefs; f) Data can be interpreted in many different ways. Have students list the kinds of information processed by computers for businesses. Ask them to prepare displays showing examples of business data processing: telephone,	DEFINITIONS OF DATA PROCESSING 1. Handling information 2. Converting facts or information into usable form 3. Handling information or data with a minimum of human effort and intervention 4. Manipulating facts about business operations in order to prepare useful information 5. Recording, sorting, calculating, summarizing, communicating, storing, and retrieving information or data of all kinds 6. Performing a systematic sequence of operations upon data 7. Applying computers to the processing of information related to the operation of business Computer Awareness, South-Western Publishing, Chapters 1, 2, 3

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	electricity, and gas bills; form letters, cheques; invoices; statements of accounts; and other examples. Point out that two major types of data are processed: business and scientific. Emphasize that research indicates that 90 per cent of all data processed is of a business nature and tht data processing is big business. Explain that businesses of all types spend large sums of money on data procurement, and that the costs of getting data are small compared to the costs of working with inadequate or inaccurate data.	Computer Awareness, South-Western Publishing, Chapters 1, 2, 3
2. recognize the importance of data processing;	Discuss the influences and uses of data processing in personal and business activities and in familiar situations such as in schools, part-time employment, shopping, transportation, medicine, banks, libraries, and factories. Make students aware of the global nature of business and business data processing in various trade and commercial activities.	TYPES OF BUSINESS DATA 1. Sales 2. Payroll 3. Inventory 4. Accounts Receivable 5. Accounts Payable 6. Interest Calculations 7. Analysis of Markets 8. Schedules of Transportation 9. Other
3. identify the two main methods of data processing;	Have students prepare research reports and displays on the various influences and uses of the two main methods of data processing.	MAIN METHODS OF DATA PROCESSING 1. Manual method 2. Computer method

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Ask students to compare the characteristics of manual and computer methods.	Exploring Business, McGraw-Hill Ryerson, Chapters 41-42
4. develop an understanding of the data processing cycle;	Have students discuss, define, and give examples of these procedures which make up the data processing cycle: origination, input, manipulation, and output.	ORIGINATION: Collection of data from source documents INPUT: Actual data or information used in the processing operation MANIPULATION: Processing of data OUTPUT: Results of the processing cycle Computer Awareness, South-Western Publishing, Chapters 4-8
5. recognize the significance of computer applications to business accounting;	Acquaint students with various business and accounting activities for which computers are used. Show students examples of various business and accounting computer printouts: mailing lists, simple trial balances, balance sheets and income statements, journals, and ledgers.	
6. define flowcharting;	Show students examples of flowcharting and have them discuss and define flowcharting.	DEFINITIONS OF FLOWCHARTING 1. The process of graphically depicting detailed steps in the solution of a problem

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
		2. A diagram using arrows and special symbols to represent the flow and steps in problem solution 3. A graphic representation of the order of operations in a data processing system or program, using symbols to represent processing operations, media, equipment, and data flow
7. explain the purpose of flowcharting;	Refer to the definitions of flowcharting. Point out that flowcharting is a program design tool and an alternate method of programming (without using computer language).	Computer Awareness, South-Western Publishing, Chapters 6-8
8. identify and use flowcharting symbols;	Refer to a template for examples of standardized symbols used in flowcharts.	
9. use flowcharting to solve problems.	Have students read, prepare, and use flowcharts to solve simple problems and diagnose office tasks. Show in detail the different activities to be performed and the sequence in which they occur. Emphasize that flowcharting is crucial to computer problem-solving.	Exploring Data Processing Careers, South-Western Publishing, projects 4-9 and 4-10

module iv: office procedures

NOTES:

Generally, this module should provide an exploratory awareness of clerical/secretarial careers and tasks, and of the office environment. Indepth introductions to tasks or skills should be viewed as "Enrichment Activities," and optional to the implementation. The teacher can use "Enrichment Activities" for students who demonstrate advanced abilities or special interests.

TIME:

This module comprises 10-20% of the course, or about 11-24 hours, depending upon the teacher's assessment of student interest and/or the total time allocated to the grade 9 course.

IV. OFFICE PROCEDURES

MAJOR OBJECTIVES: To explore clerical and secretarial career opportunities and to gain an understanding of office tasks and functions.

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Integrate study of communications, mathematics, decision-making, vocabulary development, and interpersonal skills throughout Module IV, Office Procedures. Make students aware of the personal and vocational applications of office procedures by having them view and discuss audio-visuals and by assigning them reading and research projects related to various office skills and principles.	
A. CLERICAL AND SECRETARIAL CAREERS		
	Review career-related information and principles in Module I, Career Exploration. Integrate career instruction throughout this module by familiarizing students with various types of clerical and secretarial careers and by allowing them to evaluate themselves in relation to these career opportunities, thus providing them with a basis on which to make career decisions.	Exploration of Business 9, Manitoba Department of Education, Module I, Career Exploration

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
The student should be able to:		
1. recognize the importance of clerical and secretarial skills and knowledge;	Emphasize that clerical and secretarial skills and knowledge assist individuals in these ways: in keeping accurate personal records, in writing letters and reports, in using the telephone properly, in arranging meetings, in preparing minutes for meetings, in developing notes, and in typewriting or keyboarding. Make students aware that many kinds of businesses need the services of clerical workers and secretaries.	Exploring Business, McGraw-Hill Ryerson, Chapter 15 Exploring Clerical Careers, South-Western Publishing, Path 1 Exploring Secretarial Careers, South-Western Publishing, Path 1
2. develop an awareness of common job titles in the clerical and secretarial families of occuptaions;	Have students use reference sources and "help wanted" columns in daily newspapers to develop lists of clerical and secretarial job titles.	Canadian Classification and Dictionary of Occupations, Department of Employment and Immigration, Canada Exploring Clerical Careers, South-Western Publishing, inside back cover Exploring Secretarial Careers, South-Western Publishing, inside back cover Exploring Business, McGraw-Hill Ryerson, Chapter 15
3. identify clerical and secretarial jobs in the local community;	Ask students to identify some businesses in the local community, listing various clerical and secretarial jobs in these businesses.	Telephone directory Newspapers

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
4. develop an understanding of the work environment for clerical and secretarial jobs;	Point out that learning about places where people do clerical and secretarial work is a first step in career exploration, and that these places vary. Acquaint students with the work environment by having them participate in various activities like these:	
	. touring offices, . collecting pictures of business buildings and offices, . listing words describing feelings about offices viewed in pictures or visited, . preparing displays of pictures of offices, . viewing and discussing diagrams of office floor plans and preparing floor plans of offices visited, . relating floor plans to organization and the flow of work, . collecting pictures of equipment (including microcomputers, word processors, and furniture used in offices) for displays,	Pictures of offices
	. viewing and discussing videorecordings, films, and slides of office work stations, . organizing a notebook section to include pictures, illustrations, sample forms, job titles, and descriptions related to clerical and secretarial work.	Business and Data Processing Machine Operators, Clerk, Bank, Insurance and Commerce Financial Business Services, Secretarial Services (videorecordings), Reed Career Services, Library, Manitoba Department of Education

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
5. list skills, abilities, and personal traits useful in various clerical and secretarial jobs;	Emphasize that clerical and secretarial jobs require some special basic skills and abilities, which can be learned in school and on the job. Have students discuss clerical and secretarial job descriptions from different companies, read career reference books, career stories, and the textbook, view audio-visuals, and talk with people who work in clerical and secretarial jobs; have them list the many skills, abilities, and personal traits needed by clerical and secretarial workers.	Careers in Business, National Business Education Association, pp. 15-19, 22-25 Canadian Classification and Dictionary of Occupations, Department of Employment and Immigration, Canada Exploring Business, McGraw-Hill Ryerson, Chapters 15-30 Exploring Clerical Careers, South-Western Publishing, Path 3 Exploring Secretarial Careers, South-Western Publishing, Path 3
6. develop an awareness of secondary and post-secondary education related to clerical and secretarial careers.	Point out that various business education programs are available in secondary schools, private schools, and community colleges. Show students the textbooks, supplies and equipment used in business education classes in secondary schools. Invite business education teachers/students from a secondary school to speak to the class.	General Business 101, Business Principles 201, Law 302, Economics 301, Office Procedures 302, Shorthand 202, 302, Typewriting 102, 202, 302, Manitoba Department of Education

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Acquaint students with post-secondary education in business education by obtaining calendars and brochures from private and community colleges and universities, and literature from secretarial organizations for a reference corner or display.	Calendars and brochures from private and community colleges and universities
B. THE OFFICE The student should be able to:		
1. define the term office;	Hold a class discussion and ask students to state their concepts of an office. Explain that office and business functions require management if they are to serve business, that every business needs an office, and that an office is the service/information center.	OFFICE: A place of business transactions
2. develop an understanding of the components of an office;	Emphasize relationships among the components of an office, and have students define each component: a) Objective--Every office has an objective which is related to the objectives of the organization as a whole; b) Policy--The policy under which the total business operates determines (in part) the function of the office;	COMPONENTS OF AN OFFICE 1. Objective 2. Policy 3. Function 4. Personnel 5. Physical facilities 6. Systems, procedures, methods, operating routines 7. Economical and efficient operations

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	c) Function--The function of the office is guided by the policies of the business: personnel must be available to accept assignments, to assume responsibility, to become accountable as peers or subordinates or superiors, to delegate authority and exercise control, and to be part of other involvements; d) Personnel--Human resources carry out the office function(s), office systems being as effective as the people who work in them; e) Physical Facilities--Work is carried out in physical facilities, varying from shacks on construction sites or briefcases in cars and planes, to offices of all sizes. Equipment (furniture, machines, materials) enhances the processing of work, and psychological and environmental factors (light, colour, noise, and air circulation, temperature, and humidity) affect the personnel; f) Time and Cost--Office personnel work in the context of time using standards of performance to measure productivity; since time costs money, the cost factor is important; g) System--All work activities are accomplished through a single system (simple or complex), a maze of systems with supporting networks (subsystems), or haphazardly;	OFFICE OBJECTIVE: The goals toward which the office directs its efforts POLICY: Guidelines for office organization FUNCTION: The tasks assigned to various people in the office PERSONNEL: The employees of the office PHYSICAL FACILITIES: The environmental variables or the location where the office becomes an operating reality TIME: The standards to measure the duration of productivity COST: The value of time to achieve standards of work performance SYSTEM: The operational network of an office

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	h) Procedural Steps--Steps or sequences are the components of each system which give logic and order to the accomplishment of the work at hand; i) Methods--Methods of working through procedural steps are manual, mechanical, and electronic; j) Routines--People and their routines are the core of system implementation; k) Economy and Efficiency--Each office component has the common goal of contributing to profit through servicing its parent organization.	PROCEDURAL STEPS: The components of each system which aid in the completion of work through sequences METHODS: The means of carrying out procedural steps in a system ROUTINES: The ways in which personnel carry out tasks ECONOMY: The management or regulation of office affairs with special regard for costs EFFICIENCY: The degree to which the operation of an office is cost-effective
3. identify and describe the different types of business offices;	Have students survey the local community and prepare a research report on the types of offices to be found.	Telephone directory TYPES OF BUSINESS OFFICES 1. Accounting 2. Banks 3. Credit unions 4. Government agencies 5. Insurance companies 6. Legal offices 7. Manufacturing companies 8. Medical offices 9. Service industries 10. Travel agencies 11. Utility companies 12. Real estate offices

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
4. list various tasks in different types of offices.	Point out that different offices have similar job tasks, such as answering telephones, handling mail, receiving visitors, filing and managing records, processing requisitions, purchase orders, and invoices, preparing payrolls, typewriting correspondence and various business forms, and operating calculators, microcomputers, and word processors. Assign students a research project requiring them to list the services provided by various offices in the local community.	Exploring Business, McGraw-Hill Ryerson, Chapters 16-30
C. CLERICAL AND SECRETARIAL OFFICE TASKS	Stress the importance of neatness, legibility, accuracy, and good work habits. Set up simulated office work areas in the classroom, if space permits. Allow students to explore routines and skills associated with calculators and other office equipment, if these are available in the classroom (or in the school office or secondary school classrooms).	

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
The student should be able to:		
1. define communication;	Have students discuss and define communication.	COMMUNICATION: The means by which information can be transmitted
2. understand the need for communication in an office and for office tasks;	Discuss the importance of communication to facilitate office procedures and tasks.	
3. explain the relationship between communication and the telephone;	Point out ways in which the telephone can be used to communicate within the office and with outside locations. Acquaint students with telephone equipment and services. Invite guest speakers, and use films and directories from the Manitoba Telephone System.	
4. recognize the importance of using good telephone techniques;	Acquaint students with good telephone techniques by having them participate in activities like these: . listing good telephone techniques, . preparing posters and bulletin board displays about telephone techniques, telephone equipment, and forms related to communicating by telephone, . collecting and comparing telephone message forms, and role playing the placing of different kinds of telephone calls, and the recording of messages,	Exploring Business, McGraw-Hill Ryerson, Chapter 17

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	. identifying area codes, . explaining direct distance dialing, . calculating time for the different time zones, . viewing and discussing relevant audio-visuals, . reporting on the influence of technology on telephone usage.	Exploring Clerical Careers, South-Western Publishing, Project 4-6 Exploring Secretarial Careers, South-Western Publishing, Project 4-2 Telephone Techniques and the Secretary (colour slides, cassettes, guide, transparencies), MPC Educational Publishers
5. describe methods of handling mail;	Have students describe the various postal services and classes of mail, including electronic mail, in research projects. Have students explore mailing routines, by visiting the post office or by listening to an appropriate guest speaker. Arrange for the school secretary to explain and demonstrate the procedures for handling incoming and outgoing mail in the office.	Exploring Business, McGraw-Hill Ryerson, Chapter 18 Exploring Secretarial Careers, South-Western Publishing, Project 4-5 Daily Business Communication, Handling the Mail (colour filmstrips, cassettes, guide, reproducible masters), Prentice-Hall Media Processing Incoming and Outgoing Mail (colour slides, cassette, manual, projects) MPC Educational Publishers
6. explain the basic duties assigned to a receptionist;	Discuss the role of the receptionist in relation to communication. Have students prepare research reports and displays on receptionist duties.	Exploring Business, McGraw-Hill Ryerson, Chapter 16

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Ask students to enact various situations that might occur between a receptionist and a visitor.	Exploring Clerical Careers, South-Western Publishing, pp. 95-99 and projects 4-5, 4-6A
7. recognize the need for managing and filing papers and documents;	Acquaint students with the importance of managing and filing papers and documents so that they may be retrieved when required.	Exploring Business, McGraw-Hill Ryerson, Chapter 19
	Have students prepare research reports on the influence of technology on the management of records.	Filing Skills: Alphabetical Files, Filing Systems: Automated Filing Systems (colour filmstrips, cassettes, guide, reproducible masters), Prentice-Hall Media
8. identify various filing systems;	Ask students to identify various filing systems.	Filing Procedures (colour slides, cassette, guide) MPC Educational Publishers
9. file papers alphabetically;	Explain the rules for alphabetical filing. Have students complete case studies and the projects related to filing papers alphabetically.	Exploring Clerical Careers, South-Western Publishing, pp. 92-95 and Projects 1-3, 4-3, 4-4
10. identify business correspondence and forms prepared in an office;	Have students work in groups to identify the types of business correspondence and forms used for communicating inside and outside of the office.	Exploring Business, McGraw-Hill Ryerson, Chapters 20-21
	Ask students to report on the influence of computers and word processors on the preparation and transmission of business correspondence and forms.	Daily Business Communications: Proofreading Office Communications, An Introduction to Word Processing (colour filmstrips, cassettes, guides, reproducible masters), Prentice-Hall Media

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
		Concepts of Word Processing (colour slides, cassettes, guide, transparencies), MPC Educational Publishers Exploring Secretarial Careers, South-Western Publishing, pp. 95-100, and Projects 4-4, 4-7, 4-9, 4-10
	Enrichment Activities Explain the procedures for paying employees by cash and by cheque. Have students prepare a flowchart of the procedures, and discuss and compare time cards, payroll registers, cheques, and stubs, and cash requisitions for a payroll, Demonstrate and have students follow procedures for preparing a payroll manually from given data. Acquaint students with the use of computers to prepare payrolls by having them discuss, research, and study computer payroll print-outs and visit payroll departments.	Exploring Business, McGraw-Hill Ryerson, Chapters 26-30

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
11. develop an understanding of the benefits of notemaking and/or shorthand skills;	Make students aware of these benefits which attach to notemaking skills: . acquiring the ability to record notes and think/consider at the same time, . becoming an active learner by staying alert during discussion, lecture, and dictation, . recognizing what is important, . associating new learning with what is already known in an organized fashion, . improving learning skills.	
12. identify learning skills improved by notemaking;	Emphasize how notemaking improves these learning skills: reading, writing, listening, observing, memorizing, recalling, summarizing, organizing, synthesizing, outlining, recording, reporting, and researching.	Notemaking, Gage Publishing, Chapter 1
13. list uses made of notemaking in the classroom, in personal life, and in business;	Have students produce a bulletin board list of the various uses of notemaking, leaving room for additions to the list. Organize a visit to a secondary school classroom, community college, or university to observe notemaking methods and to interview students about their methods. Invite a secretary or someone who uses shorthand to speak about the use of shorthand in preparing notes.	

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
14. identify various shorthand systems used in Manitoba secondary schools.	Show students examples of symbolic and alphabetic shorthand systems. Have them prepare research reports on the history of various systems of shorthand.	Exploring Shorthand, Gage Publishing

module v: marketing

NOTES:

This module explores the basic concerns of retailing, promotion, and business relationships. This exploration of marketing concepts is closely related to the marketing studies in grades ten and eleven. The optional "Enrichment Activities" are designed to facilitate extra interest and depth of study.

TIME:

This module comprises 10-20% of the course. The extent to which students address marketing topics is left to the teacher's assessment of interest, secondary offerings, and personal preference.

V. MARKETING

MAJOR OBJECTIVE: To recognize the importance of marketing and marketing careers by gaining knowledge of introductory marketing principles in retailing, promotions, and human relations.

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Integrate study of communications, mathematics, decision-making techniques, vocabulary development, and interpersonal skills throughout Module V, Marketing. Make students aware of the personal and vocational applications of marketing by assigning them reading and research projects related to various marketing skills, techniques, and principles and by having them view and discuss audio-visuals.	
A. CAREERS IN MARKETING		
	Review career-related information in Module I, Career Exploration. Integrate and emphasize career exploration throughout this module by familiarizing students with various marketing careers, and by encouraging them to evaluate themselves in relation to these career opportunities, thus providing them with a basis on which to make career choices.	Exploration of Business 9, Manitoba Department of Education, Module I, Career Exploration

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
The student should be able to:		
1. recognize the importance of marketing;	Emphasize that marketing is a vital part of the Canadian economy and that individuals employed in marketing jobs bridge the gap between producers and consumers of goods and services.	Exploring Business, McGraw-Hill Ryerson, Chapter 1 Exploring Wholesaling and Retailing Careers, South-Western Publishing, Path 1
2. develop an awareness of common job titles in the wholesaling and retailing family of occupations;	Have students discuss reference sources and "help wanted" columns in daily newspapers to develop a list of wholesaling and retailing job titles. Point out that jobs found in wholesaling and retailing are similar in many ways. The many job titles in wholesaling and retailing include salesperson, cashier checker, produce clerk, warehouse manager, display assistant, advertising assistant, store manager, assistant buyer, credit and collection manager.	Canadian Classification and Dictionary of Occupations, Department of Employment and Immigration, Canada Exploring Wholesaling and Retailing Careers, South-Western Publishing, Path 1 and inside back cover Exploring Business, McGraw-Hill Ryerson, Chapter 1
3. identify wholesaling and retailing jobs in the local community;	Ask students to identify some businesses in the local community and to list various wholesaling and retailing jobs in these businesses.	Telephone directory Newspapers
4. develop an understanding of the work environment for wholesaling and retailing jobs;	Emphasize that people in wholesaling and retailing careers work in different kinds of places. Acquaint students with the various work environments by having them participate in activities like these:	Exploring Wholesaling and Retailing Careers, South-Western Publishing, Path 1, Trail B

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	. visiting various types of wholesaling and retailing facilities, . collecting pictures of wholesaling and retailing buildings and offices, . listing words describing feelings about buildings and offices seen in pictures and visited, . preparing bulletin board displays of pictures of offices, . viewing diagrams of building and office floor plans and preparing floor plans of facilities visited, . relating floor plans to organization and flow of work, . listing equipment and furniture used in buildings, offices, and work stations, or collecting pictures of these for displays, . viewing and discussing videorecordings, films, and slides of wholesaling and retailing work stations, . organizing a notebook section to include pictures, illustrations, sample forms, job titles and descriptions related to wholesaling and retailing work.	Retailing and Merchandising, Sales--Commodities, Sales--Services (videorecordings), Reed Career Series, Library, Manitoba Department of Education
5. list skills, abilities, and personal traits related to wholesaling and retailing jobs;	Emphasize that wholesaling and retailing jobs require some special basic skills and abilities which can be learned in school and on the job.	Careers in Business, National Business Education Association, pp. 18-22, 26-28

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Have students read warehousing job descriptions from various companies, career stories, reference books, and the textbook, view audio-visuals, and talk with people who work in wholesaling and retailing jobs. Ask students to list the skills, abilities, and personal traits needed by warehousing and retailing workers.	Canadian Classification and Dictionary of Occupations, Department of Employment and Immigration, Canada Exploring Business, McGraw-Hill Ryerson, Chapters 1-14 Exploring Wholesaling and Retailing Careers, South-Western Publishing, pp. 11-49
6. develop an awareness of secondary and post-secondary studies related to wholesaling and retailing careers.	Point out that various marketing courses are available in some secondary schools, community colleges, and universities. Show students textbooks, supplies, and equipment used in marketing classes in secondary schools. Invite marketing teachers/students from a secondary school to speak to the class about the marketing courses.	Retailing 102, Promotions 202, Relations in Business 202, Management 302, Marketing Practicum 302 (curriculum guides) Manitoba Department of Education
	Acquaint students with post-secondary education in marketing by obtaining calendars and brochures from community colleges and universities and literature from marketing organizations for a reference shelf or display.	Calendars and brochures from community colleges and universities

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
B. RETAILING The student should be able to:		
1. define retailing;	Have students discuss and define retailing.	RETAILING: The process of satisfying customers' needs OR The process of making goods and services available to consumers
2. explain procedures for ordering goods for a merchandising business;	Have students report on procedures for ordering goods and acquaint them with the business forms used during the ordering process.	Exploring Business, McGraw-Hill Ryerson, Chapter 2
3. recognize the importance of transporting goods to and storing goods for a merchandising business;	Have students identify methods of transporting goods. Emphasize the need for security for all merchandise received, especially large volumes, and the relationship between storage and security.	Exploring Business, McGraw-Hill Ryerson, Chapter 3
4. recognize the importance of systematic receiving procedures;	Organize visits to receiving areas at a large department store or supermarket and at a small store. Have students prepare flowcharts and describe in writing the functions of receiving. Ask them to role play in groups the receiving procedures.	

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
5. identify the steps in preparing goods for sale;	Have students prepare reports and displays on receiving and checking, pricing, coding and tagging, and keeping reserve stock in order. Discuss uses of waybills, delivery receipts, bills of lading, packing slips, and invoices. Provide samples of these and have students use them in bulletin board displays.	Exploring Business, McGraw-Hill Ryerson, Chapter 4
6. develop an awareness of the relationship of product knowledge to selling products;	Discuss the importance of product information for all salespeople. Have students locate product information from the following sources: manuals from manufacturers or company sources, leaflets shipped in packing boxes, government publications, consumer reports, labels, guarantees, advertisements, salespeople, buyers, and customers.	
7. list customers' buying motives;	Discuss these buying motives related to physical and mental needs: rational buying motives, emotional buying motives, patronage motives, basic motives. Have students prepare posters/displays to illustrate buying motives, including impulse buying. Have students prepare a list of products that satisfy rational buying motives.	RATIONAL BUYING MOTIVES 1. Efficiency 2. Economy 3. Durability 4. Time-saving potential 5. Ease of repair 6. Ease of installation 7. Simplicity of instructions 8. Adaptability 9. Brand preference

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Have students prepare a list of products that satisfy emotional buying motives.	EMOTIONAL BUYING MOTIVES 1. Health 2. Romance 3. Popularity 4. Companionship 5. Pleasure 6. Security 7. Pride of ownership 8. Social approval 9. Brand preference
	Have students prepare a list of products to match patronage buying motives.	PATRONAGE BUYING MOTIVES 1. Dependability 2. Friendship 3. Reliability 4. Large assortment 5. Location 6. Image 7. Brand preference
	Suggest products that satisfy basic buying motives.	BASIC BUYING MOTIVES 1. Self preservation 2. Gain 3. Social approval 4. Convenience 5. Love 6. Pleasure 7. Variety 8. Curiosity 9. Fears

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
8. identify and explain buying decisions;	Discuss and explain these buying decisions which customers must make: . determining why they are making a purchase, . determining what type, brand, or style they should purchase, . determining where they should buy, . determining how much to pay, . determining when they should buy. Enrichment Activities Ask students to use sources of product information to identify for several products characteristics such as use, features (size, quality, durability), and product appeals. Have students describe products of their choice to the class. Discuss reasons why people go to stores. Have students prepare displays and posters relating need satisfaction to buying motives and product information. Have students perform skits matching products to customer needs and demonstrate product	Exploring Business, McGraw-Hill Ryerson, Chapter 7

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	knowledge in areas like these: . effectiveness of product, . advantages, . method of manufacturing, . materials used, . quality and construction, . cost of upkeep.	
9. develop an understanding of the selling process.	Have students give sales demonstrations and have the class use a cooperatively developed checklist to evaluate each step of the selling process.	Personal Skills Series, Selling Skills Series (colour filmstrips series, cassettes, guide, reproducible masters), Prentice-Hall Media STEPS OF A RETAIL SALE 1. The approach and needs determination 2. The presentation 3. Overcoming objections 4. Closing the sale 5. Suggestion selling
C. PROMOTIONS The student should be able to:		
1. define and understand the purpose of promotions;	Have students define promotions. Discuss the function of promotions such as displays, advertising, public relations activities, personal selling, and special activities or events.	PROMOTION: Any activity designated to increase sales and/or to promote image and goodwill

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
		Introduction to Promotion (kit), Library, Manitoba Department of Education
2. explain how displays influence customers;	Point out that a display is referred to as "visual merchandising." Have students report on promotional displays and institutional displays used by stores. Encourage students to form committees to prepare displays to promote school functions, such as dances, sports events, or co-curricular activities.	PURPOSE OF DISPLAYS 1. To sell merchandise 2. To create goodwill 3. To enhance image 4. To enhance the environment 5. To direct the flow of traffic 6. To support ideas 7. To store merchandise Exploring Business, McGraw-Hill Ryerson, Chapter 5 Display Kit (kit), Library, Manitoba Department of Education
3. describe the use of advertising and public relations to influence customers.	Review advertising concepts presented in Module II, Consumerism. Have students participate in activities like these: . developing bulletin board displays on various types of advertisements, . preparing advertisements for several products, . researching and reporting on the many kinds of media used for advertising,	Exploring Business, McGraw-Hill Ryerson, Chapter 6

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	. identifying special public relations activities, . planning and organizing one or more public relations activity. Ask students to bring to class a supply of magazines which bear good quality advertisements. Have students discuss these advertisements and use them in displays. Have students discuss advertisements in fliers, newspapers, and other print media that they bring to class. Assign projects which allow students to analyze television and radio promotions.	SPECIAL PUBLIC RELATIONS ACTIVITIES 1. Publicity 2. Sponsorships: clubs, parades, and floats 3. Demonstrations 4. Contests 5. Fashion shows 6. Prizes
D. RELATIONS IN BUSINESS The student should be able to: 1. define human relations;	Encourage students to provide their own definitions of human relations. Have them report these on a comparative basis to the class. Ask them to discuss the importance of understanding human relations. Provide case studies to emphasize the advantages of good human relations. Have students list and discuss what individuals might do to improve their human relations skills.	HUMAN RELATIONS: The ability to get along with others Human Relations for Success in Business (colour slides, cassettes, guide, transparencies), MDC Educational Publishers

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
2. identify ways to improve the development of human relations;	Discuss with students how people acquire the ability to get along with others, and why some people do not have this ability. Point out that all people are interdependent parts of a system. Use a case study with controversial content for a debate to emphasize how students relate to one another when differences of opinion occur.	<u>IMPROVING HUMAN RELATIONS</u> 1. Self-assessment 2. Listening to others 3. Working in groups 4. Accepting criticism 5. Avoiding impossible situations 6. Group therapy 7. Workshops 8. Practice 9. Study and reading
3. describe the expectation in business that employees get along with others;	Encourage students to assume the role of the employer and to describe the qualities they would expect of their staff. Provide students with job descriptions and have them prepare a list of personal traits that they would expect employees to bring to these jobs. <u>Enrichment Activities</u> Have students define <u>ethics</u> and apply the definition to employment situations. Discuss how a business is usually a series of systems, and how members of the business interrelate in their daily activities. Emphasize the advantages of trust and integrity in a business, and the way in which ethics promote trust.	<u>ETHICS</u>: The study of conduct between individuals <u>Getting Along With People on the Job</u> (cassettes, activity booklets, guide), Nelson Canada

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
4. recognize the influence of change on an individual's personality and on job satisfaction.	Discuss changing business environments, technology, jobs, expectations, resources, and other environmental factors. Have students explain how they would adjust to such influences. Identify how changes can affect job satisfaction and personality. Have students list changes that they will likely experience over the next few years, and the influences these will have on them.	

module vi: keyboarding (typewriting)
(option)

NOTES:

Implemented in schools with requisite facilities and teacher expertise, this optional module offers exploratory keyboarding experience to students who intend to pursue this skill at a later date. It is designed to familiarize students with the keyboard(s) found on typewriters, word processors, and microcomputers. The work station (posture, care and maintenance), the alphabetic and numeric keyboard, error correction, composition, and display typewriting will be explored. (The ten-key calculator number pad is explored in the Accounting module.) The production aspects of centring, correspondence, and manuscripts are considered "Enrichment Activities," to be taught where needs and abilities warrant such delivery.

TIME:

As an optional module, keyboarding (typewriting) comprises 10% of the course.

VI. KEYBOARDING (TYPEWRITING)

MAJOR OBJECTIVE: To acquire knowledge of the basic theory and principles of keyboarding and to explore introductory applications.

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
A. ORGANIZATION OF KEYBOARDING STATION The student should be able to: 1. understand the need for an efficiently organized keyboarding station.	Prepare a poster/transparency to illustrate the organization of a keyboarding station. Have students arrange their keyboarding stations according to these points: . typewriter aligned with the front of the desk, . typewriting book at the right of the typewriter, . typewriting book in upright position, . extra paper at the left of the typewriter. Emphasize the importance of organizing and maintaining an efficient work station. Point out that the organization of the work station and the preparation of the typewriter, together with correct posture, can enable students to learn and apply skills for keyboard mastery.	

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
B. <u>POSTURE AT THE TYPEWRITER</u> The student should be able to: 1. understand the need for correct posture at the typewriter and demonstrate correct posture.	Explain that correct posture is needed to develop and apply typewriting skills. Prepare a chart/transparency illustrating good typewriting posture. Have students study illustrations of good typewriting posture in order to assess their own. Emphasize that the position of the typist's body keeps the arms, hands, and fingers in correct relation to the keyboard, and that a consistent position permits all motions to be made from a relatively fixed starting point.	<u>PROPER POSTURE</u> 1. Head erect, facing copy 2. Back straight and body leaning forward slightly 3. Body approximately a handspan from the edge of the typewriter 4. Body centered opposite the J key 5. Elbows held loosely at the sides of the body 6. Feet flat on the floor 7. Hands parallel to the slant of the typewriter keyboard

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
C. <u>OPERATION, CARE, AND MAINTENANCE OF THE TYPEWRITER</u> The student should be able to: 1. explore the need for the proper operation, care, and maintenance of the typewriter.	Explain that a typewriter will provide years of good service if it is properly maintained. Review the typewriter manuals with students, obtaining information about the proper operation, care, and maintenance of the typewriter. Discuss and demonstrate the use of equipment and supplies and the procedures to follow in caring for and in cleaning the typewriter.	Typewriter manual <u>CLEANING EQUIPMENT AND SUPPLIES</u> 1. Long-handled soft brush for cleaning inside the typewriter 2. Short stiff brush for cleaning type face 3. Cleaning fluid for cleaning type face 4. Soft cloth for dusting the typewriter <u>CLEANING THE TYPEWRITER</u> 1. Dust the typewriter daily with a soft cloth 2. Use the long-handled brush to remove dust from areas of the typewriter

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
		which cannot be reached by a cloth 3. Use the short stiff brush to clean the type face 4. Use a soft cloth and cleaning fluid to clean the typewriter cylinder (platen)
D. PARTS OF THE TYPEWRITER The student should be able to:		
1. understand and explain the purposes of the most common typewriter parts;	Explain and demonstrate the use of typewriter parts as they are required. Point out that the exact location of parts varies from typewriter to typewriter. Demonstrate the use of each manipulable part immediately prior to the first time students use it; allow students to use the machine part many times, once it has been introduced. Use intense, pressured, and repetitive practice to make the use of each typewriter part automatic. Time students on the use of typewriter parts.	Typewriter manual Illustration in textbook Typewriter
2. demonstrate the correct use of the following manipulable parts of the typewriter:		

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
. backspace key,	Stress touch operation of the backspace key with the correct finger.	
. carriage return lever or carriage return key (line spacer),	Drill students on returning the carriage quickly at the end of the line with no break or pause when beginning the new line.	
. carriage release,	Explain and demonstrate the use of the carriage release and the cylinder knobs in locating various points on the carriage scale, the alignment scale, and the printing point indicator.	
. carriage scale, alignment scale, printing-point indicator,	Explain that the carriage scale counts and numbers spaces like a ruler.	
. card holders,	Explain and demonstrate how card holders keep index cards in place.	
. cylinder or platen, and knobs,	Demonstrate the use of the cylinder/platen and knobs for paper insertion and removal.	
. margin stops,	Have students set margin stops for varying line lengths.	REPETITIVE PRACTICE DRILLS FOR SOME MACHINE PARTS 1. Margin Stops: Have the students set the margin stops for a 30-, 40-, 50-, 60-, 70- space line at a given signal (ringing of a bell)

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
. margin release key, . paper bail, bail scale, bail rolls, . paper guide, paper rest/table, . paper pressure release, . shift key mechanism,	Emphasize touch operation of the margin release with the correct finger. Have students insert paper and adjust the paper bail during a timed period of approximately three seconds. Explain the purpose of the paper guide and rest/table during paper insertion. Have students use different sizes of paper to practice setting the guide. Challenge students to remove the paper from the typewriter before the bell rings or before the count of three. Demonstrate reaching quickly with the little finger to operate the shift key. Explain, demonstrate, and drill the typewriting of capital letters by pressing the shift key all the way down, typewriting the letter, and releasing the shift key quickly. Point out that, according to time and motion studies, it takes almost three times as long to type a capital letter as it does to type a lower case letter. Provide intensive, frequent drill until the motions become an integral part of the students' overall typing pattern.	2. Margin Release Key: Have students set the margin stops for a 20-space line and type a series of very short sentences of 25-space length; time students for two or three minutes 3. Tabulator Mechanism: Have students set 10 tab stops; dictate the alphabet, numbers, or words as students tab to a stop and type at the call of each letter, number or word Vary the above drill by writing letters, numbers, or words on the chalkboard/overhead transparency, while students keep pace tabulating and typewriting In a three-minute drill, students will use the tabulator bar/key at least 50 times

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
. space bar,	Emphasize and drill striking the space bar with the right thumb and instantly releasing it.	
. tabulator, tab clear, tab set.	Use flash cards with letters, numbers, or words to drill the tabulator mechanism.	
	Enrichment Activities	
	Explain or demonstrate the application and function of these special typewriter features as they are required: centring scale, correction key, end-of-page indicator, half-space key, impression control, page line indicator. Point out that special features differ according to typewriter make, and that some do not have all these special features.	Typewriter manual and textbooks
	Explain that the ratchet release should be used to type subcripts, superscripts, exponents, and double lines. Have students operate the ratchet release, roll the cylinder/platen backward or forward; type the required subscript, superscript, exponent, or double line; and return the ratchet release and the cylinder/platen to normal position. Emphasize that by following this procedure it is possible to complete an assignment without changing the normal spacing between continuing lines.	Typewriter

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Demonstrate the use of the ribbon release and the touch regulator. Demonstrate the use of the variable line spacer for realigning type or for typing copy on a line. Indicate that when the variable line spacer is used, the normal spacing between lines of type is changed. Point out that since the variable line spacer will not automatically return the cylinder to the line of writing, it should not be used for typing subscripts, superscripts, exponents, or double lines.	
E. <u>BASIC KEYBOARDING PROCEDURES</u> The student should be able to: 1. demonstrate the correct method of performing basic typewriting procedures:	Integrate procedures, as required, during and after the learning of the alphabetic and non-alphabetic keyboard. Demonstrate and have students practice the correct method of performing basic typewriting procedures. Emphasize that correct procedures help students to develop skill and accuracy.	

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
. insertion and removal of paper from typewriter,	Explain and demonstrate the correct method of inserting paper by positioning it in the middle of the cylinder. Prepare a poster or transparency of the steps to follow during paper insertion. Have students complete these steps within a given time or before a given signal.	STEPS FOR PAPER INSERTION 1. Position paper on the desk to the left of the typewriter 2. Set the paper guide 3. Pull the paper bail forward or up with the right hand 4. Grasp the paper in the left hand 5. Drop the paper behind the cylinder and against the paper guide 6. Twirl the right hand cylinder knob with a quick movement of the fingers and thumb; if the paper is not straight, pull the paper-release lever forward and adjust 7. Return the paper bail
. planning and setting of margins,	Explain and demonstrate setting margins for different lengths of lines. Have all typewriters pre-set with a 50-space line. Emphasize that margins at the sides of typed pages are controlled by "margin stops" that limit the line of writing. Have students refer to a poster listing steps or planning the margin stops during a practice session.	STEPS FOR PLANNING THE MARGIN STOPS 1. Clear all margin stops and tabs 2. Determine the length of line to be typed/number of spaces (20, 30, 40, 50, 60, etc.) 3. Divide the number of spaces by two 4. Subtract this amount from the center point 5. Set the left margin stop 6. Add half the line length to the center point 7. Set the right margin stop approximately five spaces beyond the desired length of line

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Have students set the margin stops for a 20-, 30-, 40-, 50-, 60-, 70- space line at a given signal.	
. listening for the bell,	Explain that the five spaces added to the right margin allow line-ending adjustments. Point out that the bell acts as a cue for carriage return. Explai that since mechanical adjustments vary from typewriter to typewriter, students should determine the number of spaces after the bell rings before the carriage locks.	
. making end-of-line decisions,	Emphasize that when the bell rings, the line should end as near the desired ending point as is convenient, preferably without word division.	
	Enrichment Activities Provide students with the opportunity to set tabulations for five-space indentations and to practice indenting using a series of short sentences. Have students set tabulations at 5-space/10-space intervals in a 40-, 50-, 60- space line. Time them as they type a letter, a short word (and, the),or a number at each tabulation stop for one-	TABULATION POINTS TO EMPHASIZE 1. Stretch the controlling finger to the tabulator bar; keep the other fingers as near typewriting position as possible 2. Depress the key or bar and release it quickly 3. Keep the wrists low and avoid up-and-down hand movement 4. Begin typing as soon as the carriage has reached the tabulator stop

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
. re-inserting paper and aligning typescript.	quarter minute, one-half minute, and one minute. Explain the purpose of the aligning scale. Have students practice re-inserting paper and aligning typescript. Integrate basic rules as required, during and after the learning of the keyboard. Prepare a transparency/chart to illustrate correct spacing after punctuation or have students locate this information in a textbook. Have students practice typewriting sentences or examples with punctuation marks. Explain and have students typewrite sentences or examples with punctuation marks for abbreviations and abbreviated standard and metric measurements. Discuss word-division rules and provide students with opportunities to apply these rules. Prepare charts/transparencies of word-division rules complete with examples. Acquaint students with	<u>Drilltype IV: Improving Language Skills at the Typewriter</u>, Copp-Clark Pitman <u>Canadian Business Word Division</u>, Second Edition, Gage Publishing

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	reference books to assist them with word division. Have students review/research capitalization rules. Prepare charts/transparencies of capitalization. Provide students with opportunities to apply capitalization rules in typewriting. Explain, demonstrate, and have students use correct paragraphing techniques in typewriting. Explain, demonstrate, and have students typewrite numbers correctly. Have them research the rules for typewriting numbers. Prepare transparencies/charts to illustrate the rules for typewriting numbers. Explain and demonstrate how to typewrite symbols not on the keyboard. Prepare a chart/transparency to summarize the rules for typewriting the special symbols. Provide students with opportunities to typewrite the special symbols.	<u>Reference Manual for Secretaries and Typists</u>, McGraw-Hill Ryerson <u>Drilltype 1: Typewriting Drills for Numbers and Special Characters</u>, Copp Clark Pitman

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
F. <u>ALPHABETIC KEYBOARD</u> The student should be able to: 1. identify the alphabetic keyboard;	Explain that the alphabetic keyboard consists of <u>all</u> the letters of the alphabet. Ask students to locate all the letters on the keyboard. Illustrate the alphabetic keyboard on a transparency master. Explain why the letters of the alphabet are arranged as they appear on the keyboard. Have students research the history of the typewriter.	
2. demonstrate the ability to use ballistic stroking of the alphabetic keys;	Emphasize why proper keystroking involves much more than moving the right fingers to the right keys. Explain and demonstrate correct keystroking techniques. Use teacher and student vocalization to develop ballistic stroking from the beginning of instruction.	<u>BALLISTIC STROKING</u>: The momentum of striking a key carries the key down and up again without having to maintain finger contact throughout <u>CORRECT KEYSTROKING TECHNIQUES</u> 1. Correct alignment of the fingers with the keyboard 2. Choice of the appropriate finger to make the reach 3. Direction and distance of the reach 4. Quality of the quick, snap-reach strokes 5. Speed of the finger movement in making the reach, in striking and releasing the key, and in returning the finger to guide-key position

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
3. keyboard copy to learn the operation of the alphabetic keyboard.	Point out that keyboard copy is a technical term for typewriter copy and applies to keyboard skills on the typewriter and other equipment, such as the microcomputer. Cover the alphabetic keyboard as quickly as possible (ten percent of the instruction time). Introduce the alphabetic keyboard by the sight method without the textbook. Introduce the keys in an order that permits the early use of words and sentences for practice. Print each lesson for the alphabetic keyboard on the chalkboard or overhead transparency. Have students work from the chalkboard or overhead transparency for the first few lessons. Build repetition into the practice lines, and encourage students to try to quicken keystrokes when a letter combination is repeated. Explain that keyboard learning consists of learning twenty-six letters of the alphabet, and of combining these letters together and with special characters.	6. "Feel" of the appropriate motion patterns PROCEDURES FOR INTRODUCING NEW KEYS 1. Direct students to locate the new key on the keyboard 2. Have them place their hands in typewriting position and watch the controlling finger move to the new key and back to guide-key a few times without striking to learn the direction/distance "feel" 3. Demonstrate the reach-stroke 4. Have students watch their fingers as they type a tryout drill three or four times for the new key while vocalizing the letters with the teacher 5. Have students type the same tryout drill without looking at the keys while vocalizing the letters with the teacher

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Make students aware than each new letter appears at the beginning of words, in the middle of words, and at the end of words. For example, the letter "t" is found in different positions in the words to, the, ate, let, dot, late. Teach a wide repertoire of responses to a given stimulus to develop chaining. For example, consider the combinations in which the letter "r" occurs with other letters: er, tr, fr, gr, re, etcetera. Demonstrate and explain that the finger movement to "r" is different for each combination. Explain that speed in straight-copy and production typewriting is developed by practicing these and other combinations of letters in order to produce them as single responses. In order to typewrite er, tr, and other two- and three-letter chains, students must practice them. Make the transition to the textbook after the first few lessons. Have students vocalize with the instructor each letter and space they type during the first ten textbook lessons.	CHAINING: Typewriting groups of letters as single responses rather than individual letter responses; e.g., er, to, in, and, the, etcetera.

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	The textbook lessons review the chalkboard/ transparency lessons. This repetition or rehearsal of previously learned material should result in quicker keystroking motions. Include activities like these to help students develop continuity in the operation of the alphabetic keyboard: alphabetic sentences to review all of the alphabetic keys; speed escalator sentences to push students on to higher speeds, developing speed and accuracy in using parts of the typewriter; speed escalator paragraphs of graduated lengths to assist students to build and to sustain speed; and error-elimination sentences to provide opportunities for stuients to discriminate between key locations and to practice making difficult reaches. NOTE: Provide a variety of activities during the development of continuity in the operation of the alphabetic keyboard. Present the alphabetic keyboard as quickly as possible. Present the non-alphabetic keyboard jointly with the continuity of the alphabetic keyboard.	

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
G. NON-ALPHABETIC KEYBOARD The student should be able to: 1. identify the non-alphabetic keyboard;	Explain that the non-alphabetic keyboard consists of numbers and symbols. Ask students to locate all the special numbers and symbols on the keyboard. Illustrate the non-alphabetic keyboard with a transparency master.	
2. keyboard copy to learn the operation of the non-alphabetic keyboard;	Explain that techniques for the efficient use of the alphabetic keyboard apply to the numeric/symbol keyboard. Cover the non-alphabetic keyboard within five percent of the instructional time. Combine the non-alphabetic with the alphabetic keyboard. Introduce the non-alphabetic keyboard by the sight method without the textbook. Print each of the introductory lessons for the non-alphabetic keyboard on the chalkboard or overhead transparency. Have students work from the chalkboard or the overhead transparency for the first lessons.	RESEARCH RELATED TO SPECIAL SYMBOLS 1. The following punctuation symbols are used frequently in typewriting: comma, apostrophe, quotation marks, and statistical symbols ($ and %). 2. The following symbols are seldom used in typewriting: asterisk (*), ampersand (&), and number/pound symbol (#) 3. The following signs and fractions are rarely used in business communications: cent (¢), at (@), 1/2, 1/4

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Develop proficiency in the typewriting of numbers by providing sufficient practice at the time of initial learning. Spend more time on the development of skill in typewriting numbers than in typewriting symbols. Provide intensive practice on commas, apostrophes, quotation marks, dollar signs, and percent signs through dictation and printed or handwritten sentence drills. (Refer to Research Related to Special Symbols.) Present the asterisk (*), ampersand (&), and number/pound (#) when application activities require them. Present the cent (¢), at (@), 1/2, and 1/4 signs immediately prior to their appearance in typewritten material.	
3. keyboard copy to develop continuity of the non-alphabetic keyboard.	Reinforce the learning of the non-alphabetic keyboard and speed and continuity by having students typewrite from both printed and handwritten material containing numbers and special symbols. Help students to attain a minimum speed of 20/.5 words a minute before proceeding with problem and production typewriting. Emphasize the importance of numbers in statistical tables, social insurance numbers, postal codes, accounting, and other business information.	Drilltype 1: Typewriting Drills for Numbers and Special Characters, Copp Clark Pitman

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
H. ERROR CORRECTION TECHNIQUES The student should be able to: 1. demonstrate appropriate techniques for the correction of errors.	Explain that correction paper, correction fluid, and lift-off tape are methods currently used for correcting errors. Point out that the eraser is obsolete in correcting errors on originals. Explain and demonstrate the use of correction tape, correction fluid and lift-off tape. Demonstrate and have students correct errors by inserting or crowding an omitted letter of a word. Instruct students on the technique of inserting an omitted letter of a word as the need arises.	CORRECTING ERRORS ON ORIGINALS WITH CORRECTION PAPER 1. Backspace to the beginning of the error 2. Insert the correction paper behind the ribbon and in front of the copy to be corrected 3. Retype the error exactly as made 4. Remove the correction paper 5. Backspace to the beginning of the correction and type the correction INSERTING OR CROWDING 1. The method used depends on the typewriter 2. Press the left end of the carriage to the desired typewriting position (electric or manual)

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
		3. Depress partly the backspace key to move to the desired typewriting position on a manual typewriter 4. Press against the right side of the carrier to move to the desired typewriting position 5. Use the half-space key on some electric typewriters
	Enrichment Activities Discuss how to proofread and requirements for good proofreading. Allow time for students to proofread accurately. Help students to understand where they are most likely to make errors and the different kinds of errors that may be found in any copy. Use proofreading exercises incorporating each of the types of errors.	REQUIREMENTS FOR GOOD PROOFREADING 1. Spell correctly 2. Know basic punctuation rules 3. Know the correct applications of typewriting usages, such as expressions of time, amounts of money, numbers, and symbols. 4. Make simple mathematical corrections 5. Read for details and meaning 6. Be error conscious 7. Know the types of errors commonly missed 8. Know the places errors frequently occur

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Have students proofread their daily classroom work. Prepare exercises on proofreading to meet student needs. Include typewritten and handwritten exercises.	SUGGESTIONS FOR PROOFREADING 1. Check typographical errors 2. Check transpositions and pileups 3. Check word errors (e.g., you for your) 4. Check spelling errors 5. Check style errors 6. Check grammar and typewriting usage errors 7. Check other types of errors
	Instruct students in ways of reducing errors, integrating these instructional procedures throughout the module. Pace students, having them start slowly and gradually increase speed; emphasize keystroking and spacing techniques during keyboard learning to develop speed with control. Have students type alphabetic sentences three times at alternative levels of speed to determine the speed that leads to the greatest control (minimum of errors). Help them determine which letters or letter combinations cause them to make persistent errors. Identify keystroking precision drills to reduce these errors. Emphasize that alphabetic sentences and keystroking precision drills are technique improvement practices only.	INSTRUCTIONS FOR REDUCING ERRORS 1. Positive suggestion 2. Pacing and guided writing 3. Alphabetic sentences and keystroking precision drills 4. Concentration drills 5. Correcting errors 6. Goal setting

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Encourage students to read copy for meaning and to type long and unfamiliar words. Emphasize the importance of typewriting alertness in improving skill. Allow errors to be corrected the moment they are identified, as soon as students have developed their typewriting skills to the level that key locations no longer cause hesitations. (Permission to correct errors removes the tension which causes them, and knowledge of time lost in making corrections helps to convince students to work at their control level.) Encourage students to set daily and weekly goals for all of their typewriting activities. Emphasize the importance of setting realistic goals and of recording performance results. Enrichment Activities Explain the guidelines for straight-copy timings. Use timed writings following the completion of development of keyboard continuity. Begin timed writings with four different 2 1/2 - minute timings	GUIDELINES FOR STRAIGHT-COPY TIMINGS 1. Measure speed in gross words a minute 2. Use ten-minute samples of performance consisting of four 2 1/2 - minute, or three 3 1/3 - minute timings

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	of equal difficulty. Move as soon as possible to timed writings with three different 3 1/3 - minute timings of equal difficulty. (Ten minute samples of performance--four 2 1/2 - minute or three 3 1/3 - minute timings--provide a highly reliable measure of stroking speed.) Record student performance, scoring gross words per minute (Table 1) and errors (Table 2), to serve these functions: . maximize reliability of scoring, . increase information available to both student and teacher for remedial work, . provide a valid basis for grading. Convert the two separate scores into a grade. Decrease emphasis on straight-copy testing after students have acquired skill at typewriting paragraphs at speeds of 20 to 25 words per minute (gross) on ten-minute samples of performance consisting of three 3 1/3 - minute timings.	3. Introduce 3 1/3 - minute timings as soon as possible and use exclusively after introducing them 4. Use arranged copy, initially, so students can duplicate the copy line for line 5. Introduce early copy requiring students to listen to the bell for the end of the line Timed Writings (Drilltype 3) in The Drilltype Series, Copp Clark Pitman Exploration of Business 9, Manitoba Department of Education, Appendix A, Testing, Grading, and Evaluation, Tables 1 and 2

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
I. COMPOSITION The student should be able to:		
1. compose while typewriting:	Integrate composition at the typewriter into the instruction of typewriting after students have learned the keyboard, rather than teaching it as a separate unit or attempting to do all the exercises in succession. Develop a sequential plan for teaching composition at the typewriter, beginning with simple activities and moving to complex activities. Give students clearly defined objectives that make composing assignments meaningful learning experiences. Emphasize that the typewriter is a writing tool, not merely a copying tool.	Drilltype IV: Improving Language Skills at the Typewriter, Drilltype V: Improving Spelling Skills at the Typewriter, Copp Clark Pitman
. one word responses,	Have students compose one-word answers to simple questions. Include number typewriting only after the numbers have been presented.	
. phrase responses,	Have students type two- or three-word answers to questions.	
. sentence responses.	Instruct students to reply to questions with complete sentences.	

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
J. DISPLAY TYPEWRITING The student should be able to: 1. demonstrate the ability to use display or art typewriting.	Discuss the use of display typewriting in composition activities at the typewriter. Enrichment Activities A. Centring and Tabulations Instruction should consist of a series of experiences, helping students to proceed sequentially to the level of achievement expected at the end of the activity. Proceed sequentially through all the components of instruction in copy-arrangement procedures for centring and tabulations, letters, and manuscripts.	COMPONENTS OF INSTRUCTION 1. Inform students of the objectives 2. Recall prerequisite information 3. Present the stimulus material (the copy to be typed) 4. Provide learning guidance (demonstration and problem-solving) 5. Elicit performance (student imitation of demonstrations and completion of steps) 6. Provide feedback about performance correctness (checking by student and teacher) 7. Assess the performance (completion of problems by students without guidance from the teacher)

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Emphasize this learning sequence to develop student competence: . practicing or reviewing a problem (form, arrangement, special characteristics, procedures required in the solution), . building efficient procedural patterns, decision-making habits, and speed in the completion of problems, . building sustained production skill on familiar copy by following directions quickly and carefully, arranging and handling work materials efficiently, detecting and correcting errors, using between-problem time effectively, and disposing of completed work rapidly, . determining the level of production competence resulting from learning/skillbuilding steps. Have students develop the ability to type well-balanced, attractive copy centred on half and full sheets of paper.	8. Retain and transfer learning (spaced reviews and repetitions of the process) <u>STEPS FOR PRODUCTION COMPETENCE</u> 1. Problem solving (or review) 2. Problem skill building: . timed practice on parts of the problem . teacher pacing and timed interval pacing . timed writings on the whole problem 3. Sustained production 4. Production measurement

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Collect examples, or have students bring examples, of centring to the classroom for a bulletin board display. Explain that the centring process is one of the most basic applied typewriting operations. Centring is requisite for arranging and typewriting announcements, tabulations, reports and often letters and other forms of communication.	Textbook illustrations Examples from newspapers
	Determine if students know the names and functions of the typewriter parts required for centring.	MACHINE PARTS REQUIRED FOR CENTRING 1. Paper guide and scale 2. Line-of-writing scale 3. Cylinder knobs 4. Alignment scale 5. Paper release 6. Line-space selector 7. Space bar 8. Backspace key 9. Margin set mechanisms 10. Tab clear and set keys 11. Carriage return 12. Shift keys and lock
	Emphasize such terms as horizontal, vertical, margins, equal, half, above, below, centre, centre point, left, right, top, bottom, side, single space,	BASIC PRINCIPLES FOR CENTRING 1. Horizontal Centring Principle: To centre a line horizontally, half the spaces in the line must be to

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	double space, triple space, full sheet, and half sheet. Have students demonstrate a knowledge of these concepts by answering questions about them. (For example, "What does vertical mean?") Explain the use of single spacing, double spacing, triple spacing, variable spacing (between groups of lines and between groups of words in a line), capitalization, and spread headings. Project the copy to be typed on a screen, write it on the chalkboard, or refer to it in the textbook. Pace the sequential steps required to centre a line or lines horizontally. Demonstrate procedures for clearing margins and tabulator stops, setting the linespace regulator, setting a tabulator stop at the horizontal	the left of the horizontal centre point of the paper and half to the right; the resulting left and right margins must be approximately equal 2. Vertical Centring Principle: To centre the copy vertically, half the lines must be above the vertical centre of the paper and half the lines below; the resulting top and bottom margins must be approximately equal Textbooks STEPS FOR CENTRING LINES HORIZONTALLY 1. Clear margins and tabulator stops 2. Insert and adjust paper 3. Position print point at the centre of paper 4. Set the tabulator stop 5. Locate the backspace key

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	centrepoint of the paper, and backspacing from the horizontal centrepoint once for each two letters and spaces in each line. Have students follow these step-by-step procedures. Have them repeat the entire exercise following a chart of steps for centering lines horizontally. Explain and demonstrate the steps to follow in centring a copy vertically. Have students imitate the demonstration step-by-step to complete the vertical centring of a copy. Have them repeat the entire process following the chart of steps. Assess understanding and performance by assigning two or three similar problems for students to complete without guidance or prompting. Have students who successfully complete these problems typewrite several one-minute timings to increase speed and to connect ideas about centring copy horizontally and vertically.	6. Spell the line, while backspacing once for every two letters and/or spaces 7. Type the line 8. Return the carriage 9. Press the tabulator key/bar to reach the centre STEPS FOR CENTRING COPY VERTICALLY 1. Insert and adjust paper 2. Count the lines (printed and blank) within the copy 3. Subtract this total from the available lines on the paper 4. Divide by two to obtain the number of blank lines for the top margin 5. Count, while spacing down once for each blank line in the top margin 6. Type the display following horizontal centring techniques

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Begin the centring section with print and arranged input and follow with handwritten and unarranged input. Emphasize production typewriting. Review the objectives and notes related to proofreading and editing. Have students proofread, edit, and correct original documents. Prepare transparencies of one- and two-column tabulations. Discuss and have students identify the parts of tabulations: main headings, column headings, and columns. Prepare students to typewrite tabulations.	Textbook illustrations PREPARATION FOR TYPEWRITING TABULATIONS 1. Basic keystroking mastery of numbers and symbols 2. Mastery of the basic centring procedures 3. Mastery of basic sub-routines: tabulating for indenting paragraphs, columns of words, alternated columns of words and numbers, and columns of numbers and symbols

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Demonstrate the backspace-from-centre process for centring headings and columns.	BACKSPACE-FROM-CENTRE PROCESS 1. Use the "backspace once for two" method for headings 2. Use the same method to centre columnar items: . backspace one for each two characters in the longest entry in each column, . backspace one for each two spaces to be left between columns (even numbers to simplify backspacing)
	Use short, easy tabulations to initiate learning. Add one new feature at a time: a centred heading, an additional column, etcetera.	TYPES OF SHORT, EASY TABULATIONS 1. One-column tabulation 2. One-column tabulation with centred heading 3. Two-column tabulation 4. Two-column tabulation with centred heading
	Have students format one- and two-column tabultions from printed and handwritten input, arranged and unarranged. Project the tabulation to be typed (stimulus material) on a screen, write it on the chalkboard, or refer to it in a textbook.	

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Discuss and demonstrate the steps to follow in typewriting a one-column tabulation. Have students imitate the demonstration step-by-step to complete the one-column tabulation. Assess understanding and performance by assigning two or three similar problems for students to complete without guidance. Have students who successfully complete these problems typewrite several one-minute timings to increase speed and to connect ideas about typewriting a one-column tabulation. Use the same procedures for typewriting a one-column tabulation with a heading, a two-column tabulation and a two-column tabluation with a heading. Begin the tabulation section with printed and arranged input and follow with handwritten and unarranged input. Have students type a sufficient number of tabulations to ensure achievement of adequate learning. Emphasize production typewriting procedures.	

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Review the objectives and notes related to proofreading and editing. Have students proofread, edit, and correct original copies of tabulations. B. <u>Correspondence</u> Collect examples of typewritten letters for a bulletin board display. Ask students to assess the appearance of the letters. Prepare a transparency/chart of a letter. Have students identify the parts of a letter. Discuss the placement rules for letters by referring to textbook illustrations, bulletin board displays, and transparencies. Emphasize that placement must be judged during the typewriting of letters of various lengths. Encourage stu-	<u>PARTS OF A LETTER</u> 1. Date line 2. Letter address 3. Salutation 4. Body 5. Complimentary Close 6. Company Name (Optional) 7. Written Signature 8. Typewritten Signature 9. Reference Initials

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	dents to estimate letter lengths, and to judge the spaces between the top of the page and the return address, and between the date and and the letter address, rather than counting vertical spaces. Define a personal business letter and business letter, providing examples of each. Emphasize block style and point out that all lines begin at the left margin. Use printed and arranged input. Follow the letter style and name suggested in the curriculum guide, regardless of the textbook. Prepare a flowchart of steps for typewriting letters on a transparency/chart/chalkboard. Discuss and demonstrate the steps to follow in typewriting a personal business letter in block style. Have students imitate the demonstration to complete a letter, following a flowchart of the steps.	PERSONAL BUSINESS LETTER: A letter that is written by an individual to a business firm or an organization BUSINESS LETTER: A letter that is written by a business firm or organization to an individual or business organization STEPS FOR TYPEWRITING LETTERS 1. Estimate letter length 2. Set 38 mm left and right margins 3. Determine the position of the date line 4. Start typewriting the date line 50 mm from the top of the paper 5. Determine the position of the letter address 6. Type the letter address and salutation 7. Type the body of the letter

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
		8. Determine the position for the complimentary close 9. Finish the letter 10. Proofread the letter and remove it from the typewriter 11. Prepare the envelope
	Give students several one-minute timings to increase their speed in moving from one part of a letter to another, once they are confident about the placement and format of block letter style. Incorporate these suggestions for one-minute timings: . date line to inside address, . inside address to salutation, . salutation to the first paragraph, . last paragraph to the closing and signature lines. Point out that problem-typewriting skill and production proficiency demand that each of the links in the decision-making/performance chain be executed correctly, in the right order, and in minimum time--from the stimulus (the letter problem) to the completion of the re-	

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	sponses (the completion of the typed letter). Have students tie the sequential responses together, thereby developing skillful problem typewriting and sustained production competence. Teach students production work, giving them organized, intensive instruction and practice rather than straight-copy timings and practice in copying problems. Train students in the sequential elements of problem-solving and production typewriting. Use the same procedures for business letters in block style. Have students type a minimum of three personal business letters and three business letters in block style. Have them type letters using the no-point punctuation style. Review the objectives and notes related to proofreading and editing. Have students proofread, edit, and correct original documents.	<u>SEQUENTIAL ELEMENTS</u> 1. Direction 2. Demonstration 3. Imitation 4. Intensive drill

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Collect examples of typewritten envelopes for a bulletin board display. Prepare a chart/transparency master to illustrate the areas of an envelope, explaining the purpose of each area. Point out that Area 5 is the machine sorting code band. Demonstrate the addressing of large envelopes, emphasizing that 90 percent of all businesses use these. Have students imitate the demonstration to address several envelopes, and then follow the same procedures independently. Emphasize that the postal code must be typed on Area 4 of the envelope. Prepare a display chart to illustrate the proper method of folding and inserting letters into envelopes. C. Manuscripts Collect or have students bring examples of typewritten one-page manuscripts for a classroom display.	PURPOSE OF ENVELOPE AREAS 1. Area 1: return address and post office stickers 2. Area 2: postage stamps 3. Area 3: letter address 4. Area 4: postal code 5. Area 5: blank Teacher's Guide to Proper Addressing, available from Canada Post

TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Determine if students have mastered these skills for typewriting simple manuscripts: basic machine operation skills, machine adjustment knowledge (margin setting, spacing information, and using the line space selector and return, the end-of-page indicator, and the tabulator stop setting for indenting paragraphs), horizontal centring principles and procedures, and hyphenation of words at line endings. Prepare a transparency of a one-page manuscript. Discuss and have students identify the title and body (paragraphs). Discuss the placement rules for manuscripts (the placement of margins, page numbers, spacing, title). Prepare transparencies that indicate the placement of manuscripts, and refer to textbook illustrations. Emphasize that placement must be judged during the typewriting of manuscripts. Encourage students to estimate the top margin rather than counting vertical spaces.	

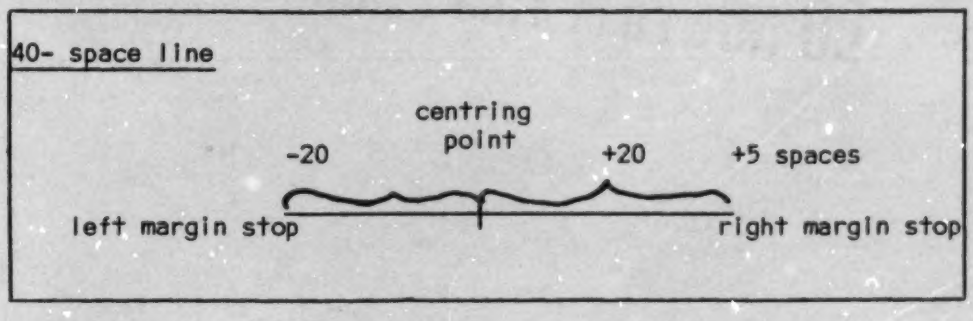
TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Discuss and demonstrate the steps to follow in typewriting a one-page manuscript. Have students imitate the demonstration to complete the manuscript. Have them repeat the entire one-page manuscript following a flowchart of steps that has been prepared on a transparency or chalkboard. Discuss the format of manuscript footnotes when necessary. Explain that style manuals and educational institutions differ on the format. Have students type footnotes from printed copy and from a transparency or chalkboard of printed copy. Review the objectives and notes related to proofreading and editing. Have students proofread, edit, and correct original documents. Give students a short lead-in paragraph requiring a footnote from the typewriting textbook. Have them typewrite the paragraph and prepare the footnote using information on the title page of the typewriting textbook.	STEPS FOR TYPEWRITING ONE-PAGE MANUSCRIPTS 1. Determine if the manuscript is to be bound or unbound 2. Adjust margins for the type of binding 3. Insert and adjust paper, using a manuscript frame if footnotes are required 4. Centre and type title; set five-space paragraph indention and machine for double spacing 5. Type the manuscript

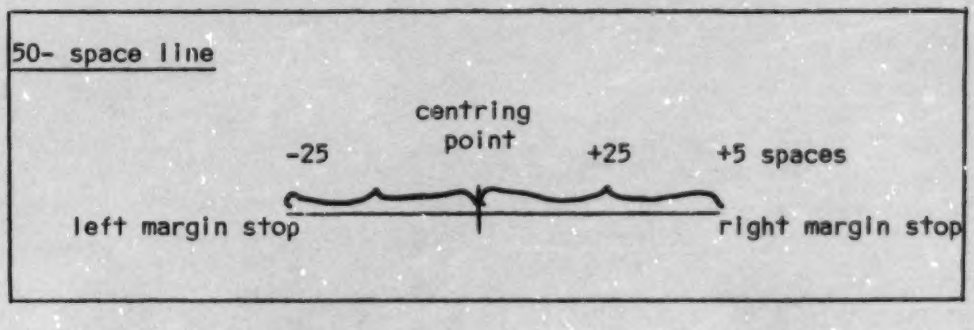
TOPICS AND OBJECTIVES	SUGGESTED ACTIVITIES AND NOTES	RESOURCES
	Have students bring textbooks for other subjects to class. Have them compose short paragraphs requiring footnotes from these textbooks. Determine when students become confident about the placement and the format of a one-page manuscript, and then give them several one-minute timings to increase their speed in proceeding from one part of the manuscript to another (title to first paragraph, paragraph to paragraph, paragraph to footnote, footnote). Have students type approximately four one-page manuscripts (some without and some with footnotes). Supplement textbook material if necessary, selecting an appropriate number of additional manuscripts to ensure achievement of adequate learning. Emphasize production typewriting.	

overhead transparency masters

module vi: keyboarding (typewriting)

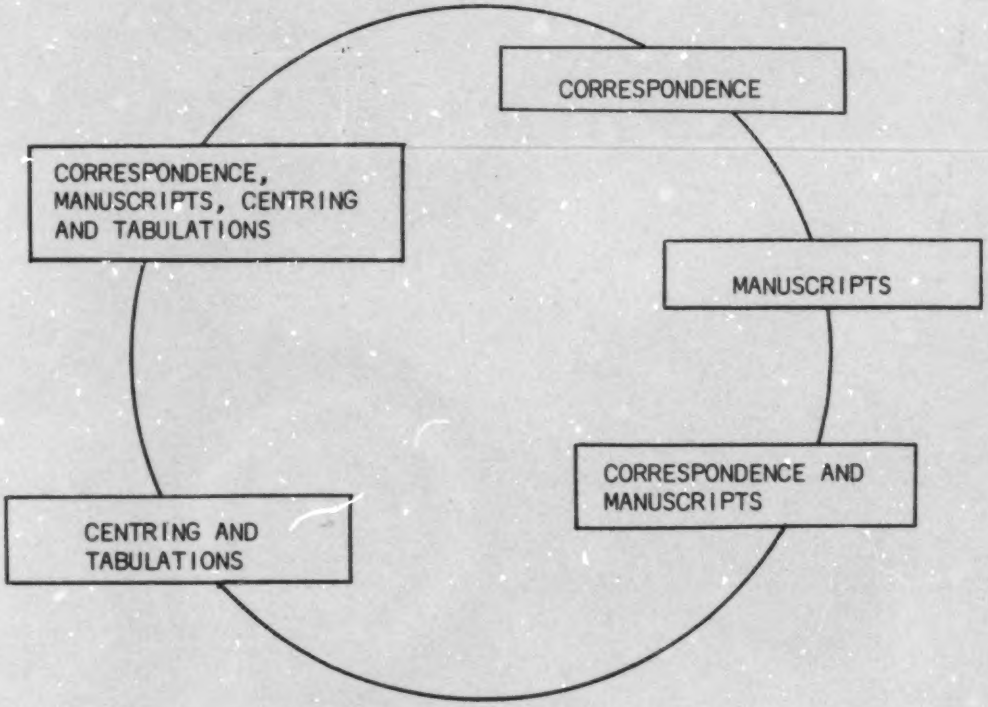
Setting Margin Stops





CYCLICAL APPROACH TO PROBLEM

AND PRODUCTION TYPEWRITING



Transparency Master 2

Letter Placement

PLACEMENT CHART
BUSINESS, PERSONAL/BUSINESS, AND PERSONAL LETTERS
(P4 STATIONERY: 21.5 cm x 28 cm)

LENGTH OF LETTER	APPROXIMATE NUMBER OF PARAGRAPHS	RETURN ADDRESS OR DATE LINE (FROM TOP OF PAGE)	SIDE MARGINS	SPACE BETWEEN DATE AND LETTER ADDRESS
Short	3 or fewer	50 mm	38 mm	38 mm
Medium	3-5	50 mm	38 mm	25 mm
Long	5 or more	50 mm	38 mm	13 mm

Because a business letter is usually typed on letterhead, type the date line 50 mm from top of page or two blank lines below the letterhead. Because personal and usually personal/business letters are typed on plain stationery, the first line of the return address begins 50 mm from top of page. The date line follows the last line of the return address.

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Canadian Association of Administrative Personnel

Suite 344, 36 King Street East
Toronto, Ontario M5C 2L9
Phone (416) 925-3121

2 1977 08 11

6 Mr. Alfred J. Madison
9 Ajax High School
11 Bayly Street
13 Ajax, ON
14 L1S 1P2

17 Dear Mr. Madison:

30 Thank you for your letter requesting a copy of Telephone Voices.
42 This particular publication is no longer available because its
55 contents have been used to produce a filmstrip for our Personnel
58 Training Program.

70 If you would like to view the filmstrip to assess its value to
81 your program, we shall be delighted to send it to you.

83 Sincerely,

88 CANADIAN ASSOCIATION OF
93 ADMINISTRATIVE PERSONNEL

97 Suzanne F. Shepherd
101 Customer Relations

102 SFS:mh

BEST COPY AVAILABLE

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Total word count
114 with envelope

7.8 p.144 Type the following letter using modified block style with two-point punctuation. Follow all the steps in the flowchart shown on page 138. Make corrections when necessary. Use your initials to indicate that you typed the letter. Prepare an envelope.

McKenzie fashions limited

27 CENTRAL STREET
SUMMERSIDE, PE C1N 3K8
PHONE (902) 293-8414

1976 06 15 2

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Four Seasons Boutique 6
P. O. Box 1413 9
Summerside, PE 12
C1N 4K2 13

Ladies 14

It is a pleasure to welcome you as a customer of McKenzie Fashions 27
Limited, and to thank you sincerely for the opportunity to serve 40
you. 41

As we take a very real and personal interest in customer satisfac- 54
tion, we should greatly appreciate your letting us know, by mail 67
or telephone, how you would like us to handle your first order. 80
More than that, we want you to know that our interest does not 93
stop with the first delivery. If at any time our product and our 106
service do not merit your enthusiastic approval, we would consider 119
it a favor if you would call us at once. 127

We are ready and eager to serve you. 134

Sincerely yours 137

McKENZIE FASHIONS LTD. 141

Jonathan K. McKenzie 145
General Manager 148

JKM:yoi 149

Total word count
with envelope 160

v.15 p.147 Type the letter on page 140 in block style with no-point punctuation. Prepare a carbon copy and an envelope. Make corrections when necessary.

89

Transparency Master 5

testing, grading and evaluation
module vi: keyboarding (typewriting)

appendix a
appendix b

APPENDIX A (To be used if all "Enrichment Activities" are studied.)

TESTING, GRADING, AND EVALUATION FOR MODULE VI: KEYBOARDING (TYPEWRITING)

Grades for reporting periods should be stated as a single percentage, combining straight-copy testing and production testing results. Grades for terminal evaluation should be weighted as follows: 50 percent for straight-copy timed writings, and 50 percent for timed production testing.

The teacher should ensure that the student's final grade reflects his or her achievement at the end of the course.

A. Straight-Copy Timed Writings

1. Have students typewrite near the end of the grading period three consecutive 3 1/3 - minute straight-copy timings on different copy of equal difficulty (S.I. intensive).
2. Record the speed score on each of the three 3 1/3 - minute straight-copy timings as gross words per minute. Convert each speed score to a percent rate (refer to Table 1).
3. Average the percent rates of the speed scores.
4. Total the errors of the three 3 1/3 - minute straight-copy timings.
5. Record the accuracy score, as a percent rate, on the total of the errors in the three 3 1/3 - minute straight-copy timings (refer to Table 2).
6. Convert the two separate scores (speed and accuracy) into one grade, by averaging the percent rates.

NOTE: The instructor may assign equal weight to speed and accuracy. However, research indicates it is preferable to assign more weight to speed; e.g., give speed twice the importance of accuracy, then record the speed percent rate twice and the accuracy percent rate once and divide the total of the percent rates by three: $\frac{2S + 1A}{3}$

B. Production Typewriting

1. Have students type a timed test based on one kind of task (centring, tabulation, correspondence, manuscripts) or a test including several types of tasks on all of the components.
2. Record the separate scores for production typewriting: one for quality (accuracy and set-up) and one for speed.
3. Record the speed score as a percent rate (refer to Table 3).
4. Record the quality score for production as a percent rate (refer to Table 3).
5. Convert the two separate scores (quantity and quality) into one grade, by averaging the percent rates.

NOTE: The instructor may assign equal weight to quantity and quality; however, quality is usually considered more important than quantity for production typewriting. Consequently, it is suggested

that quality receive more weight than quantity; e.g., give quality twice the importance of quantity, then record the quality percent rate twice and the quantity percent rate once and divide the total of the percent rates by three: $\frac{2 \text{ Quality} + 1 \text{ Quantity}}{3}$

C. Composite Terminal Grade

1. Combine the terminal grade for straight-copy typewriting with the terminal grade for production typewriting for semester-end/year-end reporting.

2. Use the following tabulation to determine the terminal grade:

Straight-Copy Typewriting	- 50%
Production Typewriting	- 50%
. Centring and Tabulations	
. Correspondence	
. Manuscripts	
TOTAL	100%

TABLE 1

STRAIGHT-COPY SCORING TABLE
for Gross WPM
in First-Year or First-Semester Training[1]

	Weeks of Training		
GWPM	4	6	Year
	2	3	Semester
11	52		
12	54		
13	56	51	
14	58	52	
15	60	53	
16	62	54	
17	64	55	
18	66	56	
19	68	57	
20	70	58	
21	72	60	
22	74	62	
23	76	64	
24	78	68	
25	80	70	
26	82	72	
27	84	74	
28	86	76	
29	88	78	
30	90	80	

	Weeks of Training		
GWPM	4	6	Year
	2	3	Semester
31	92	82	
32	94	84	
33	96	86	
34	98	88	
35	100	90	
36		92	
37		94	
38		96	
39		98	
40		100	
41			
42			
43			
44			
45			
46			
47			
48			
49			
50			

[1]A grading schedule in which the average grade = 75%, using three 3 1/3 - minute tests with copy of SI=1.5 or AWL=5.6. Passing Grade = 50%

ERROR SCORING TABLE
For Total Errors in Ten Minutes
When 1 EPM Earns the Minimum Passing Grade of 50%[1]
(E = Number of Errors; G = Grade)

E	G	E	G
1	95	11	45
2	90	12	40
3	85	13	35
4	80	14	30
5	75	15	25
6	70	16	20
7	65	17	15
8	60	18	10
9	55	19	5
10	50	20	0

[1]For Exploration of Business Keyboarding, the 10-minute sample of performance can consist of four 2 1/2 - minute, or three 3 1/3 - minute, timings with all errors totalled. Three 3 1/3 - minute timings are recommended for grading.

CHART FOR CONVERTING TIME SCORES TO GRADES

Minutes	Tally	No. of Students Completing	Grade Assigned
4-1/4	1	1	100 - 100
4-1/2	1	1	96.66 or 97
4-3/4	1	1	93.33 or 93
5	11	2	90 - 90
5-1/4		0	86.66 or 87
5-1/2		0	83.33 or 83
5-3/4	1	1	80 - 80
6		0	76.66 or 77
6-1/4	11	2	73.33 or 73
6-1/2	11	2	70 - 70
6-3/4	1	1	66.66 or 67
7		0	63.33 or 63
7-1/4----------1111-----middle------		4	----------60
7-1/2	11	2	56.66 or 57
7-3/4	1	1	53.33 or 53
8	11	2	50 - 50
8-1/4	1	1	46.66 or 47
8-1/2	11	2	43.33 or 43
8-3/4	1	1	40 - 40
9	11	2	36.66 or 37
		26	

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The following procedure is recommended, based on the average grade score of 60:

(a) Prior to administering the test, arrange on the chalkboard a column of consecutive one-quarter-minute completion times.

(b) Inform students that they are to signal the completion of the test by raising a hand.

(c) Set the stop watch at the start of the test.

(d) When a student raises his/her hand, tally the completion time on the chalkboard chart. The student should record on his/her test paper the time—in quarter minutes--taken to complete it. Continue recording until all students have finished the test. Students may bring their papers to the teacher for recording the time taken (speed).

(e) Locate on the chart the time taken by the middle student in the group. (The sample chart indicates that the middle student (13th) completed the test in 7-1/4 minutes).

(f) Assign the average grade (say 60) to the time taken by the middle student.

(g) Assign the top grade (100, or 99) to the time taken by the student who completed the test in the least time (4-1/4 minutes in the accompanying chart).

(h) Calculate the difference between the top grade (100) and the average grade (60). Divide the difference (40) by the number of one-quarter-minute steps above the middle. (In the accompanying chart there are 12 one-quarter minute steps above the middle, 7-1/4.) The result (3.33) is the increment in the grade to be assigned to each one-quarter-minute step above the middle, and the decrement in the grade to be assigned to each one-quarter minute step below the middle.

QUALITY SCORING TABLE FOR PRODUCTION

Deductions based on a score of 100 points for a perfect test item

1. Gross errors making the item unusable:[1]
   a. Word errors (omitted, added, substituted, transposed, repeated) that affect meaning
   b. Misspelled words (particularly proper names)
   c. Noticeably poor corrections
   d. Incorrect word division
   e. Grossly poor horizontal or vertical placement or violation of conventional format
   f. Frequent typographical errors within one item

2. Errors acceptable, if corrected:[2]
   a. Noticeably misaligned capital letters or letters within words
   b. Strikeovers that are noticeable
   c. Failure to capitalize
   d. Omitted hyphen
   e. Typographical errors (misstrokes within words or figures)
   f. Spaces within words

3. Trivial errors acceptable and uncorrected:[3]
   a. Two spaces between words
   b. Irregular spacing before or after punctuation marks
   c. Piling or spreading of letters within words
   d. Nearly invisible strikeovers

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[1] For each gross error deduct 15%
[2] For each acceptable error deduct 10%
[3] For each trivial error deduct 5%

TABLE 5

THE LINE COUNT METHOD

Measuring Performance at the Typewriter in Preparation for Word Processing

Assign 50 spaces (10 words) as an average for all lines typed whatever their length. The conversion from words a minute to lines a minute and vice versa when desired is a simple process. To translate lines typed in one minute to words a minute, add one decimal place to the right of the line count figure. For example:

Line Count	Words-a-Minute Equivalent
3 lines	30 WAM
4.5 lines	45 WAM
7.3 lines	73 WAM

To translate words typed in one minute to a per-minute line count, move the decimal one place to the left.

Words-a-Minute	Line Count Equivalent
60 WAM	6 lines
55 WAM	5.5 lines
47 WAM	4.7 lines

To convert line count to words-a-minute when the line count represents more than one minute, divide the line count by the number of minutes typed and add one decimal place to the right. For example:

Lines Typed		Minutes Typed		Line Count Per Minute		Words-a-Minute
20	-	5	=	4	=	40 WAM
48	-	10	=	4.8	=	48 WAM

To convert total words typed to a per minute line count, divide by the number of minutes and move the decimal point one place to the left. For example:

Total Words Typed		Minutes Typed		Words-a-Minute	Per Minute Line Count
150	-	5	=	30	3 lines
420	-	10	=	42	4.2 lines

TABLE 6

LINE COUNT ASSESSMENTS

FOR A LETTER:

. 1 line for the date, inside address, and salutation
. 1 line for complimentary close, signature block, and reference lines
. 1 line for each line typed in the body of the letter
. 1 line for each envelope to be addressed

FOR A MEMO:

. 1 line for each line typed in the body
. 1 line for all lines preceding the body (the "inside address")
. 1 line for signature, initials, and reference notations

MANUSCRIPTS:

. 1 line for each line typed. On a double-spaced manuscript, count only the actual lines of typing. If footnotes are used, the line dividing the body of the manuscript and the footnotes is counted as a line. One line count is allowed for each line of footnote typing.

TABLES:

. 1 line for each line typed including headings, full line rulings and footnotes

DO NOT include in your count . line that contains any of the following:

uncorrected error	incorrect word
misspelled word	strike over
omitted word	incorrect punctuation
inserted word	

358

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APPENDIX B

TESTING, GRADING, AND EVALUATION BY THE LINE-COUNT METHOD FOR MODULE VI: KEYBOARDING (TYPEWRITING)

Refer to the introductory paragraph of Appendix A.

A. Straight-Copy Timed Writings

Refer to Appendix A.

B. Production Typewriting

Method 1:

1. Have students type a timed test of one kind of task (centring, tabulation, correspondence, manuscript) or a test including several types of tasks, or all of the course components.

2. Record two separate scores for production typewriting: one for quality and one for quantity (speed) in either of two ways.

3. Set a specific time for the test. Call in papers at time limit. Record the quantity (speed) score as a percent rate. (Refer to Table 5 which uses line length of 50 and considers total lines typed regardless of errors.)

4. Record the quality score for production based on line count as a percent rate (refer to Table 4).

5. Convert the two separate scores (quantity and quality) into one grade, by averaging the percent rates (refer to Appendix A).

OR

Method 2:

1. Have students type a timed test of one kind of task (e.g., centring, tabulation, correspondence, manuscript) or a test including several types of tasks, or all of the course components.

2. Record two separate scores for production typewriting: one for quality and one for quantity (speed) in either of two ways.

3. Allow ample time for test completion. Record the speed score as a percent rate (refer to Table 3).

4. Record the quality score for production based on line-count as a percent rate (refer to Table 6). This table uses line length 60 and considers usable lines produced. Only lines correctly typed are considered. Therefore, do not mark quality further. Instead, record the usable lines produced as a percent of the possible usable lines.

5. Convert the two separate scores (quantity and quality), by averaging the percent rates, into one grade (refer to Appendix A).

C. Composite Terminal Grade

Refer to Appendix A.

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